

POLICY & RESOURCES CABINET BOARD

REPORT OF THE HEAD OF CORPORATE STRATEGY AND DEMOCRATIC SERVICES AND THE HEAD OF BUSINESS STRATEGY AND PUBLIC PROTECTION

27TH NOVEMBER 2014

SECTION A – MATTER FOR DECISION

WARDS AFFECTED: ALL

WELFARE REFORM – LOW INCOME FAMILIES PROJECT – ADVICE LINE

PURPOSE OF REPORT:

To report the outcomes of the evaluation of one of the three pilot projects that have been undertaken as part of the Local Service Board's - Low Income Families Project.

BACKGROUND:

The Council, on behalf of the Local Service Board, has drawn down European Social Fund Grant in the sum of £590, 948 which has been used to fund new ways of working in collaboration. A condition of the Grant is the completion of an evaluation of the impact of the use of the Grant money which has to be completed by 31st December 2014.

The monies drawn down have funded the following three Projects:

1. Low Income Families Project (three pilot projects)
2. Promoting the Independence & Wellbeing of Vulnerable Adults – Intermediate Care (AFIC)
3. Vulnerable Families

On the 16th October the Policy & Resources Cabinet Board received reports on the outcomes of two of the three pilot projects initiated under the Low Income Families Project (The Hub at Pontardawe; and the collaboration between the Library Service and Job Centre Plus). The purpose of today's report is to provide Members with the outcomes of the evaluation of the third pilot project initiated under the Low Income Families Project – a dedicated advice line and triage service for benefits advice (executive summary and full evaluation report is attached at Appendix 1).

Context:

The Welfare Rights Unit (WRU) is part of the Social Services, Health and Housing Directorate. Their role is to provide both first tier and second tier services in relation to benefits maximisation. They offer training on all aspects of the benefits system both to staff of the Council and the third sector working in partnership with them. They also respond to requests for tailor made training from external organisations for which a reasonable charge is made.

They provide advice, information, casework and advocacy in a number of ways, the telephone advice line being the most recent innovation. Outreach surgeries are delivered in most parts of the County Borough.

A lot of the work involves Tribunal Representation. In the first half of 2014/15 (1st April -30th September) they represented 168 people at appeals with a success rate of 75 - 80%.

If people are not able to attend one of their surgeries or deal with their problems over the telephone, they can usually arrange a home visit for them, although they may have to wait a little longer but they will always try to accommodate any deadlines which relate to their case.

In 2013-14, the WRU raised or preserved over £6.7 million in benefit income for people living in Neath Port Talbot.

Demand for the Welfare Rights Unit (WRU):

The Welfare Rights Unit receives a large number of calls and when customers did get through they were often not able to speak to an advisor straight away and were having to wait anything up to 2 weeks for a call back.

As well as the high demand for advice from the Welfare Rights Unit, the Unit was also dealing with a large number of appeals. 629 demands in June 2013 were recorded by the Welfare Rights Team.

The Welfare Rights Unit did previously run an advice line operating 4 mornings per week (2 hours each time) but the demand for it could not be met. A large number of messages were being taken as the staff taking the calls were not able to put calls through to the Welfare Rights Officers due to their volume of work. This led to long delays in people being called back as the officers had such a large caseload.

Due to the high volume of work within the Welfare Rights Unit, customers were unable to get through to the Welfare Rights Unit on the phone and were finding that the voice mail was full so they could not leave a message. There were reports from the Council's Contact Centre that only 1 in 3 calls were able to be put through to the Welfare Rights Unit.

The Pilot Project

On 2nd December, a new dedicated advice line operated by two Welfare Rights Benefit Advisors in the Council's Contact Centre was launched for a pilot period of 6 months. The pilot would enable citizens requiring initial benefits advice to improve their financial situation at a much earlier point and reduce the impact of longer term hardship. It was also hoped that the pilot would free up capacity within the Welfare Rights Unit to deal with the complex cases that require more intensive intervention.

The two advisors are employed on a full time basis and operate the advice line from 8.30 – 4.30, Monday to Friday. Calls come to the advisors via a number of routes. Calls that come into the Council's Contact Centre asking about any form of benefits or welfare assistance are transferred directly to the advisors. Calls that are received by the Welfare Rights Unit which are new clients, are also transferred to the advisors.

The key findings of the evaluation of this pilot were:

- There has been a positive impact, both on the Welfare Rights Unit and Contact Centre as well as on outcomes for clients
- The advice line are dealing with an average of 407 calls per month
- The main reason for customers contacting the advice line is for a benefits check
- 177 clients were dealt with one stop

- 210 clients required involvement from the Welfare Rights Unit after receiving help from the advice line advisors (attending a surgery, a home visit, to see the Macmillan Specialist or another type of referral). This represents 23% of all actions taken for clients who received advice from the advisors
- 338 clients were passed onto a benefits agency (a range of departments within the Department of Work and Pensions and Her Majesty's Revenue and Customs). They received initial advice via the advice line advisors but then then needed to contact the Department of Work and Pensions in order to be able to resolve their query. This represents 37% of actions taken further to receiving advice
- 157 clients were referred onto other supporting organisations, groups or charities. This represents 17% of actions taken further to receiving advice
- For 81% of those interviewed, the council was the first agency they thought to contact when looking for advice or support
- 87% of those interviewed said they would be likely to use the advice line or similar services for future queries
- 88% of those interviewed said they felt more confident in dealing with their situation further to receiving advice
- 20% of those interviewed were successful in claiming extra benefits. 22% of those asked were still awaiting the result of their claims
- The number of messages being taken for the Welfare Rights Unit has fallen by 51%, since the start of the advice line, freeing up their capacity to deal with more complex cases
- Calls into the Welfare Rights Unit have fallen by 15.5% since the advice line was launched
- Welfare Rights Officers/ staff have been very positive about the advice line and feel that clients are getting a much better service as they can access help straight away
- Staff morale in the Welfare Rights Unit has improved
- The Contact Centre are putting 30% fewer calls through to the Welfare Rights Unit than prior to the advice line running

RECOMMENDATION:

To endorse the following actions:

1. To extend the pilot to end of March.
2. Officers to undertake a further analysis of the totality of advice calls coming into the Council and to look at how we may provide a more efficient way of dealing with these calls enabling better access to advice for citizens.
3. Officers to explore sources of funding available to sustain any changes made to service delivery arrangements.

REASON FOR PROPOSED DECISION:

To enable officers to explore options for sustaining improvement work beyond 31st March 2015 whilst maintaining current standards of service delivery.

APPENDICES:

Appendix 1 – Evaluation Report – Advice Line

OFFICER CONTACT:

Karen Jones, Head of Corporate Strategy & Democratic Services,
Telephone 01639 763284, email: k.jones3@npt.gov.uk

Caryn Furlow, Organisational Development Consultant,
Telephone 01639 763242, email: c.furlow@npt.gov.uk

Jackie Hankins, Welfare Rights Team Manager, Telephone 01639
685245, email@ j.hankins@npt.gov.uk

Jayne Banfield, Customer Services Manager, Telephone 01639 634001,
email: j.banfield@npt.gov.uk

COMPLIANCE STATEMENT

WELFARE REFORM – LOW INCOME FAMILIES PROJECT (ADVICE LINE)

(a) **Implementation of Decision**

The decision is proposed for implementation after the three day call in period.

(b) **Sustainability Appraisal**

Community Plan Impacts:

Economic Prosperity	Positive
Education and Lifelong Learning	Positive
Better Health and Well Being	Positive
Environment and Transport	Positive
Crime and Disorder	Positive

Other Impacts:

Welsh Language	Neutral
Sustainable Development	Positive
Equalities	Positive
Social Inclusion	Positive

(c) **Consultation**

This item is not subject to external consultation.

**Building Capacity and Capability to accelerate
service transformation from the citizens'
perspectives**

EVALUATION

EXECUTIVE SUMMARY

Low Income Families Project

Advice Line

October 2014



EXECUTIVE SUMMARY

Pilot Project No.2 – Dedicated advice line and triage service for benefits advice

Aim

To provide an advice line and triage service for benefits advice.

Context

The Welfare Rights Unit (WRU) is part of the Social Services, Health and Housing Directorate. Their role is to provide both first tier and second tier services in relation to benefits maximisation. They offer training on all aspects of the benefits system both to staff of the Council and the third sector working in partnership with them. They also respond to requests for tailor made training from external organisations for which a reasonable charge is made.

They provide advice, information, casework and advocacy in a number of ways, the telephone advice line being the most recent innovation. Outreach surgeries are delivered in most parts of the County Borough.

A lot of their work involves Tribunal Representation. In the first half of 2014/15 (1st April -30th September) they represented 168 people at appeals with a success rate of 75 - 80%.

If people are not able to attend one of their surgeries or deal with their problems over the telephone, they can usually arrange a home visit for them, although they may have to wait a little longer but they will always try to accommodate any deadlines which relate to their case.

In 2013-14, the WRU raised or preserved over £6.7 million in benefit income for people living in Neath Port Talbot.

Demand for the Welfare Rights Unit (WRU)

The WRU receives a large number of calls and when customers did get through, they were often not able to speak to an advisor straight away and were having to wait anything up to 2 weeks for a call back.

As well as the high demand for advice from the WRU, the Unit was also dealing with a large number of appeals. 629 demands in June 2013 were recorded by the Welfare Rights Team.

The WRU did previously run an advice line operating 4 mornings per week (2 hours each time) but the demand for it could not be met. A large number of

messages were being taken as the staff taking the calls were not able to put calls through to the Welfare Rights Officers due to their volume of work. This led to long delays in people being called back as the Officers had such a large caseload.

Evidence from the Council's Contact Centre showing the demand to be put through to the Welfare Rights Unit

Due to the high volume of work within the WRU, customers were unable to get through to the WRU on the phone and were finding that the voice mail was full so they could not leave a message. There were reports from the Council's Contact Centre that only 1 in 3 calls were able to be put through to the WRU.

The Pilot Project

On 2nd December, a new dedicated advice line operated by two Welfare Rights Benefit Advisors in the Council's Contact Centre was launched for a pilot period of 6 months. The pilot would enable citizens requiring initial benefits advice to improve their financial situation at a much earlier point and reduce the impact of longer term hardship. It was also hoped that the pilot would free up capacity within the WRU to deal with the complex cases that require more intensive intervention.

The two advisors are employed on a full time basis and operate the advice line from 8.30 – 4.30, Monday to Friday. Calls come to the advisors via a number of routes. Calls that come into the Council's Contact Centre asking about any form of benefits or welfare assistance are transferred directly to the advisors. Calls that are received by the WRU which are new clients, are also transferred to the advisors.

Findings

2443 calls were received for the advice line during the 6 month pilot period (2nd December – 30th May 2014). Across the 6 months of the pilot project, an average of 407 calls were received each month.

826 new cases were dealt with by the advisors during the pilot period. On average they dealt with 138 new cases each month. Clients contacted the advice line about a wide range of issues. Benefit checks far outnumbered any other reason for calling the advice line, constituting over 35% of the enquiries made (298 enquiries).

The total number of calls received by the Welfare Rights unit fell by 15.5% during the period of the advice line running when compared with April- Sept 2013 (4307 calls prior, 3639 calls during the advice line running).

Of the 3639 calls received by the WRU, 2273 (62%) were processed with straight away, either by being transferred straight to a WRO, resolved by admin staff, transferred straight to the advice line or booked into surgery. This

was an increase from 2158 calls (50% of calls) prior to the advice line commencing.

Of the 1085 calls who asked to or needed to speak with a WRO (message, taken for a specific WRO, referral to a WRO, transferred to WRO or transferred to WRO answer machine) 407 (38%) were transferred straight to the relevant person compared to 25% in the pre advice line period. 678 of those who had contacted the WRU had to wait for a call back (a fall of almost 13% when compared to the pre advice line data).

The number of messages being taken for WRU staff fell significantly during the 6 months of the advice line running. 508 messages were taken for WROs, which was a fall of 51% when compared to the pre advice line period.

The number of referrals for WROs also fell significantly during the period of the advice line running. This figure fell from 207 referrals (inc referrals for home visits) to 101 referrals (a fall of over 50%). Prior to the advice line running, if the admin staff were unable to deal with an enquiry, it would have had to be referred to a WRO. Many of those enquiries are now transferred to the advice line instead, reducing the workload on WRO staff and preventing them from having to deal with some of the new cases.

An average of 135 calls per month were being put through from the Council's Contact Centre to the WRU. This was a drop of 30% when compared to April-September 2013 and is therefore freeing up capacity within the WRU. The Contact Centre have reported that they no longer have difficulty in putting calls through to the WRU. However, the Contact Centre is not always able to put calls through to the advisors based there, as the advisors can be on one call for a long period of time due to the complex nature of some cases, or there are occasions where there may only be one advisor present.

177 clients were dealt with one stop and required no further action having spoken to the advice line advisors. Benefit checks were the cases most likely to be dealt with one stop although a range of other cases were also dealt with in one stop. A benefit check enables the advisor to look at a client's circumstances and determine if they are in receipt of any benefits which they are entitled to in order to maximise the benefits that they can receive.

210 clients required involvement from the WRU further to receiving help from the advice line advisors – this included to attend a surgery, a home visit, to see the Macmillan Specialist or another type of assistance. This represents 23% of all actions taken for clients who received advice from the advisors. They were then passed to the WRU for further work. Whilst these clients have not been dealt with in one stop, the fact that the advisors are part of the WRU and are therefore able to make appointments in surgeries or direct referrals to the WRU, makes the process easier for callers and is another way of dealing with clients, 'in house' (as the WRU is part of NPTCBC).

338 clients were directed to a benefits agency (a range of departments within the Department of Work and Pensions and Her Majesty's Revenue and

Customs). They received initial advice via the advice line advisors but then needed to contact the DWP in order to be able to resolve their query. This may have involved requesting a form, making a telephone claim or the first stage of the claim process. This represents 37% of actions taken for clients who received advice.

157 clients were referred onto other supporting organisations, groups or charities which included; Food Bank, Housing benefits/ Council Tax, Citizens Advice Bureau, NEST, NPT Homes, ENFYS, Credit Union, Blue Badge, Debt Advisor, ATOS, Social Services, Landlord, Shelter, MIND and to a doctor. (Any other referrals were only made on one occasion). This represents 17% of actions taken further to receiving advice.

Client Feedback

47 clients who had contacted the advice line were telephoned at a later date to ask for their feedback on the service. Benefit checks outnumbered any other query being made with 31% of queries being for this reason. Clients interviewed were also asked if their case was resolved at the time of speaking to an advisor (ie. was it dealt with one stop). 54% of cases were resolved one stop.

Of the 47 clients contacted for feedback, 88% of those interviewed felt more confident in dealing with their situation after having received support. There were several reasons for this. The general themes for this were related to clients having been given more information so knowing where they stood and feeling like they had somewhere else to go for help which had alleviated some of their concerns.

In many cases it is not known whether clients had an increased income due to acting on the advice received as this is not recorded unless the client rings the advice line again for further assistance or to advise them of the outcome. It can also take many months for the outcome to be known if a client is waiting for the outcome of an appeal or application for benefits. However, a number of the 47 clients (10 clients) contacted for feedback were successful in claiming benefits as a result of the advice that they had received.

Clients interviewed were asked if they had contacted any other agencies based on the advice that they were given. In these cases, to enable their queries or needs to be addressed, clients had been signposted to an agency that would be able to help. 28% (14 people) of those interviewed had contacted another agency. 63% had not (no data for 9% of cases).

Clients were asked if they had previously contacted another agency about the same issue. Only 19% (9 clients) had done this. 81% contacted the council as their first port of call.

Important to the outcomes that clients experience is their understanding of the advice that they received and how helpful they found it. 92% of those interviewed understood either all or most of the advice that they were given

and 96% of those asked said that they found the advice that they were given either very helpful or somewhat helpful.

87% of those interviewed said that they would be likely to use services such as the advice line for other issues or concerns which demonstrates that they must have found their experience to be a positive one. The remaining 13% of clients did not respond to the question.

Agency Feedback

A workshop was held with the staff from the WRU to determine their views on the advice line and what impact it had had.

There was a consensus amongst staff that the advice line has had a positive impact on the WRU. This was for a range of reasons;

- (i) It has freed up their time to work on more complex case work
- (ii) It has relieved pressure on the administrative staff who used to be on the receiving end of aggravated clients who were unable to be transferred to a WRO or who had phoned previously and not been called back.
- (iii) Morale has improved in the office.

One of the key points raised was that clients now have access to immediate advice during working hours and an overall better customer service experience is offered. Accessing advice is easier as there are two full time members of staff on the advice line whereas the advice line that used to be staffed within the WRU was only for a few hours each day, 4 days per week whereas it now runs all day, 5 days per week. Now that there is much greater capacity to offer advice by phone, slots in surgeries are available for assisting clients with form filling and more complex cases. Whilst the advice line offers an alternative to clients to speaking to the WRU, WRU staff felt that there is still a need for surgeries and home visits for complicated cases.

Prior to the advice line starting, the first point of contact for clients was with the administrative staff in the WRU. They would then be transferred to a WRO if one was available. Now clients are being put through to the advice line, usually straight away. Clients are also able to ring back and speak to the same advisor again which ensures continuity for the client and they are able to build up a rapport with the advisor.

WRU staff felt that not only has the service offered to clients improved in terms of having access to benefits advice, but that the advice line also relieves pressure on other council departments who previously didn't know what to do with some of their calls. Other departments have had training on this now and know that if clients mention financial issues or welfare advice, where to direct them to which ultimately is a better service for clients who get directed to the right place more quickly. There are still some staff in other council departments who are unaware of the WRU and advice line and turnover of staff in some areas can further impact on this situation.

The two advisors who staff the advice line were interviewed to gauge their view on the line and how well it has worked. The advisors very much felt that they are helping clients and often exceed clients' expectations, as having done a full benefits check, clients often end up with more than they had expected. In some cases clients are reluctant to give out all of their information over the phone. However, other clients see the advisors as being much like the Citizens Advice Bureau as they can speak to other agencies on behalf of clients if needed, which takes the pressure off clients.

The number of calls being dealt with by the advice line demonstrates the demand that is there for it and this was backed up by the advisors who said that although it was quiet when the line was first launched, it picked up more than they expected and there is a lot of repeat business with customers ringing back for further help. They felt that they are working at full capacity, with the volume of calls being greater than they had anticipated.

The advisors are aware of the impact the advice line has had on the WRU and that it has taken the pressure off of them. Whilst the advisors were in no doubt that clients are benefiting financially from the service they offer, they also spoke of the emotional benefit to clients of giving people a point of contact to come to if they need help. When asked, the advisors did acknowledge that the support they offer could create a dependency for some clients as they do speak to some clients on frequent occasions.

Welfare rights staff also felt that the advice line may have a positive impact on customers as they will not lose out on money due to delays in receiving advice or meeting deadlines to apply for certain benefits. The advice line advisors pointed out some of the limitations to the service as clients will sometimes ring only a short time before the deadline to appeal a benefit decision. The advisors will always do their best to offer advice and support right up to the deadline.

Whilst customers may ring the advice line about one issue or concern, they are offered a full benefit check whilst they are on the phone therefore this may lead to them receiving new benefits that they wouldn't have otherwise have done and to reduce the impact of the welfare reform on them.

There are, however, some issues that have arisen which need to be addressed which would further improve the efficiency of the service being offered.

- Duplication of work as sometimes clients don't tell the advice line that they have already contacted the WRU about their issue. Referrals for the WRU may then be taken by the advice line for clients that already have cases open with a WRO.
- On occasion there has been a delay in referrals received by the advice line (which require more in depth assistance) being passed over to the WRU.

- Staff were asked about any concerns they had about the service. Comments were largely related to the future sustainability of the service and the impact it would have if it ended.
- Over the course of the 6 months pilot project, 30.7% of calls to the advice line's direct number were abandoned (ie. not answered when first rung). The reasons for this and what could be done to address it need to be considered.
- Providing staff cover for the advice line for holidays and sickness can put pressure on WRU staff who have to cover the advice line.

The advice line has been extended for a period of 4 months, from June – September 2014 using further ESF funding. Future funding is being sought.

Conclusion

- There has been a positive impact, both on the WRU and Contact Centre as well as on outcomes for clients
- The advice line are dealing with an average of 407 calls per month
- The main reason for customers contacting the advice line is for a benefits check
- 177 clients were dealt with one stop
- 210 clients required involvement from the WRU after receiving help from the advice line advisors (attending a surgery, a home visit, to see the Macmillan Specialist or another type of referral). This represents 23% of all actions taken for clients who received advice from the advisors
- 338 clients were passed onto a benefits agency (a range of departments within the Department of Work and Pensions and Her Majesty's Revenue and Customs). They received initial advice via the advice line advisors but then then needed to contact the DWP in order to be able to resolve their query. This represents 37% of actions taken further to receiving advice
- 157 clients were referred onto other supporting organisations, groups or charities. This represents 17% of actions taken further to receiving advice
- For 81% of those interviewed, the council was the first agency they thought to contact when looking for advice or support
- 87% of those interviewed said they would be likely to use the advice line or similar services for future queries
- 88% of those interviewed said they felt more confident in dealing with their situation further to receiving advice
- 20% of those interviewed were successful in claiming extra benefits. 22% of those asked were still awaiting the result of their claims
- The number of messages being taken for the WRU has fallen by 51%, since the start of the advice line, freeing up their capacity to deal with more complex cases
- Calls into the WRU have fallen by 15.5% since the advice line was launched

21.10.14

- Welfare Rights Officers/ staff have been very positive about the advice line and feel that clients are getting a much better service as they can access help straight away
- Staff morale in the WRU has improved
- The Contact Centre are putting 30% fewer calls through to the WRU than prior to the advice line running

MAIN REPORT

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Pilot Project No.2 – Dedicated advice line and triage service for benefits advice

Aim

To provide an advice line and triage service for benefits advice.

Context

The Welfare Rights Unit (WRU) is part of the Social Services, Health and Housing Directorate. Their role is to provide both first tier and second tier services in relation to benefits maximisation. They offer training on all aspects of the benefits system both to staff of the Council and the third sector working in partnership with them. They also respond to requests for tailor made training from external organisations for which a reasonable charge is made.

The WRU also provide policy advice to managers in the Council who are planning new services to enable them to gain maximum advantage from the benefit system for service users.

They provide advice, information, casework and advocacy in a number of ways, the telephone advice line being the most recent innovation. Outreach surgeries are delivered in most parts of the County Borough – many of which are in Communities First areas as the WRU receives funding for four workers to work in these areas from the Welsh Government.

The WRU work closely in partnership with Macmillan Cancer Care to deliver benefit advice to cancer patients and their families, not just in Neath Port Talbot but also in Singleton Hospital, Swansea and to people living in Bridgend.

A lot of their work involves Tribunal Representation. In the first half of 2014/15 (1st April -30th September) they represented 168 people at appeals with a success rate of 75 - 80%.

If people are not able to attend one of their surgeries or deal with their problems over the telephone, they can usually arrange a home visit for them, although they may have to wait a little longer but they will always try to accommodate any deadlines which relate to their case.

In 2013-14, the WRU raised or preserved over £6.7 million in benefit income for people living in Neath Port Talbot.

Demand for the Welfare Rights Unit (WRU)

The WRU receives a large number of calls and when customers did get through, they were often not able to speak to an advisor straight away and were having to wait anything up to 2 weeks for a call back. Calls for the WRU regularly featured in the top ten calls received by the Council's Contact Centre.

As well as the high demand for advice from the WRU, the Unit was also dealing with a large number of appeals. 629 demands in June 2013 were recorded by the Welfare Rights Team of which 25% were in relation to appeals and appeal queries and 18% needed support with filling in forms.

The WRU did previously run an advice line operating 4 mornings per week for 2 hours each time (subject to officer availability) but the demand for it could not be met. A large number of messages were being taken as the staff taking the calls were not able to put calls through to the Welfare Rights Officers due to their volume of work. This led to long delays in people being called back as the Officers had such a large caseload of work and if clients happened to be out when they called back, this could lead to a longer delay.

The number of calls coming into the WRU were recorded and analysed for a 6 month period from 1st April – 30th Sept 2013. 4307 calls were logged during this time. The Admin team who answer the calls were able to resolve 1582 calls (36% of total calls) over the phone at the time of the call.

Of the 4307 calls received by the WRU, only 2158 (50%) were dealt with straight away, either by being transferred straight to a Welfare Rights Officer (WRO) resolved by admin staff, transferred straight to the advice line or booked into a surgery. Of the 1035 calls who asked to or needed to speak with a WRO (message taken for a specific WRO, referral to a WRO, transferred to WRO or transferred to WRO answer machine) only 257 (25%) were transferred straight to the relevant person, therefore 778 had to wait for a call back.

A large number of messages were being taken or answer phone messages left, all of which generated an enormous amount of work for staff to have to deal with later. During the 6 month period looked at, 1037 messages were taken for WROs or for the original WRU advice line, all of which needed to be responded to (this does not include the number of calls transferred to a WRO answer phone as it is not known how many of these actually left messages).

The number of calls being passed through from the Council's Contact Centre to the WRU was recorded for the same period (Apr-Sept 2013) and an average of 192 calls per month were being put through, peaking at 254 calls in May 2013.

Evidence from the Council's Contact Centre showing the demand to be put through to the Welfare Rights Unit

Due to the high volume of work within the WRU, customers were unable to get through to the WRU on the phone and were finding that the voice mail was full so they could not leave a message. There were reports from the Council's Contact Centre that only 1 in 3 calls were able to be put through to the WRU. This was having a particular impact at Neath One Stop Shop as customers who were unable to get through on the telephone were then calling in, in person thus creating a duplicate contact. Then, when unable to get

through again by phone via reception they would leave their contact details with One Stop Shop staff for the WRU to ring them back as they had not been able to get through to a Welfare Rights Officer.

Inputs (Resources) and Activities – The Pilot Project

To address the issues outlined above and to mitigate the potential impact of future welfare reforms, the following partners; the Council's Welfare Rights Unit, Contact Centre and the Low Income Families Project collaborated to test out a new way of working.

On 2nd December, a new dedicated advice line operated by two Welfare Rights Benefit Advisors in the Council's Contact Centre was launched for a pilot period of 6 months. The pilot would enable citizens requiring initial benefits advice to improve their financial situation at a much earlier point and reduce the impact of longer term hardship. It was also hoped that the pilot would free up capacity within the WRU to deal with the complex cases that require more intensive intervention. The lessons learned will feed into the review of advice services across the county borough that the Local service Board will be taking forward during 2014/2015.

The two advisors are employed on a full time basis and operate the advice line from 8.30 – 4.30, Monday to Friday. Calls come to the advisors via a number of routes. Calls that come into the Council's Contact Centre asking about any form of benefits or welfare assistance are transferred directly to the advisors. Calls that are received by the WRU which are new clients, are also transferred to the advisors. The advice line has been set up and is running as was originally intended when the project was scoped.

Prior to commencing offering advice, the advisors undertook a 4 week training course. For the first 2 weeks that they were giving advice, they were under the supervision of a more experienced worker and throughout the project, a more experienced worker has operated the advice line alongside one of the regular advisors, initially for 2 days per week and more recently, one day a week so that they have been available in a mentoring capacity. The advisors have also been on a number of external training courses, some in-house, bought in by the WRU and some elsewhere. Ongoing training is very important in this type of work, especially with the current rate of change in relation to welfare reform.

As part of the evaluation, all clients contacting the advice line were asked if they would be happy to be contacted at a later date to find out about their experience of using the advice line. Of those clients who agreed to this, 47 were contacted by telephone and asked to answer a number of questions.

Outputs

2443 calls were received for the advice line from when it commenced on the 2nd December – 30th May 2014. For the first 3 months that the advice line was open, the number of calls received rose each month. In the first month that

the line opened (December 2013) the number of calls received was considerably lower than has since been the case. This is likely to be attributed to the fact that it was a new service and both the public and other staff needed to get to know about it. The line was also closed for a week during the Christmas period, therefore the number of calls received that month was not reflective of an, 'ordinary month.'

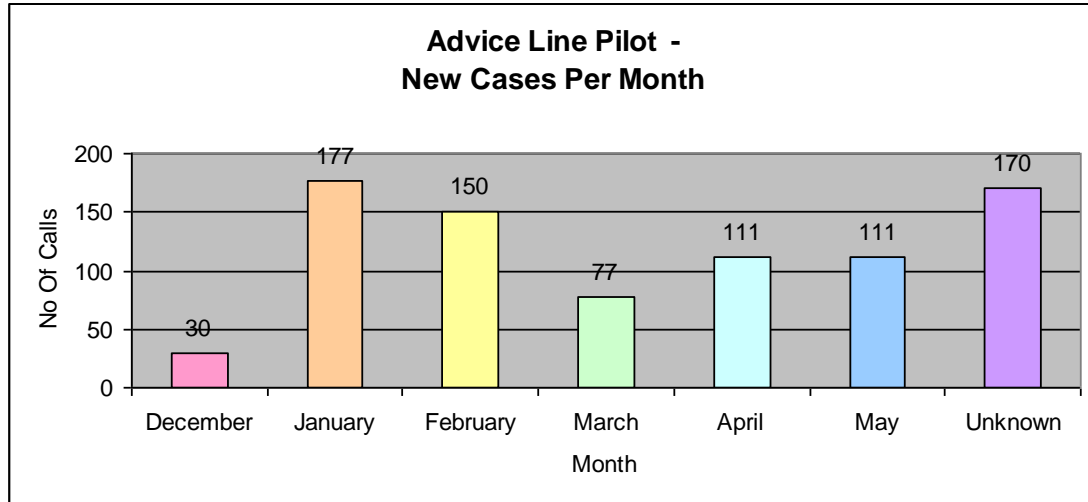
Across the 6 months of the pilot project, an average of 407 calls were received each month. Excluding the first month of the pilot for the reasons outlined above, an average of 459 calls per month were received (January – May) and this is likely to be a more accurate reflection of the level of demand for the service. The greatest number of calls to date was in May 2014, reaching almost 500 in that month. This is shown in figure 1 below.

Figure 1

Month	Number of calls received
December	147
January	376
February	476
March	470
April	476
May	498
Total	2443

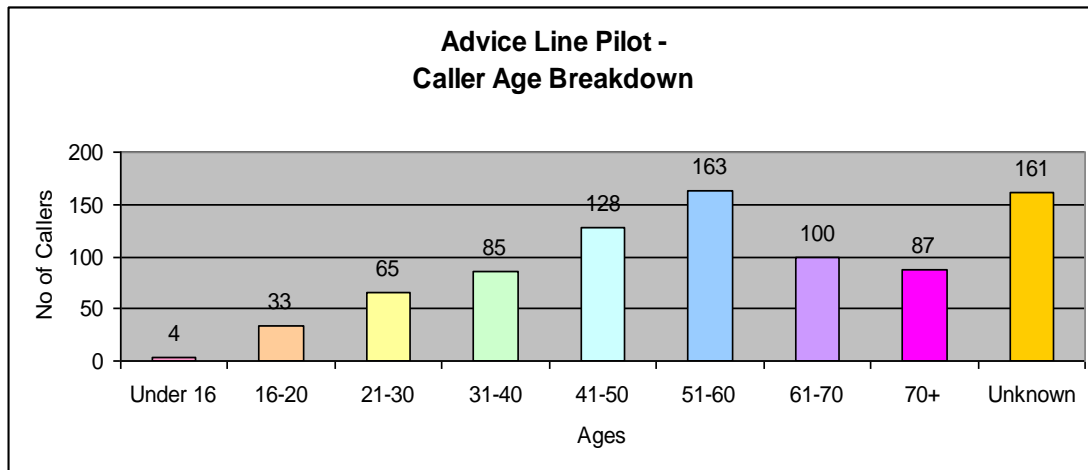
Figure 2 below shows the total number of new cases dealt with by the advisors each month as recorded from the case files which was 826. On average they dealt with 138 new cases each month. It is clear from these figures that new cases (in some cases the figures below will include the same client twice but who had rung back on a later occasion to make a different enquiry) constitute a fairly small percentage of the total volume of calls dealt with by the advice line advisors. This ranges between 47.1% in January to 16.4% in March. The rest of the calls the advisors received included; clients ringing back about the same issue, colleagues ringing about a number of other issues relating to the role and other organisations ringing back regarding enquiries that the advisors had made on behalf of clients.

Figure 2



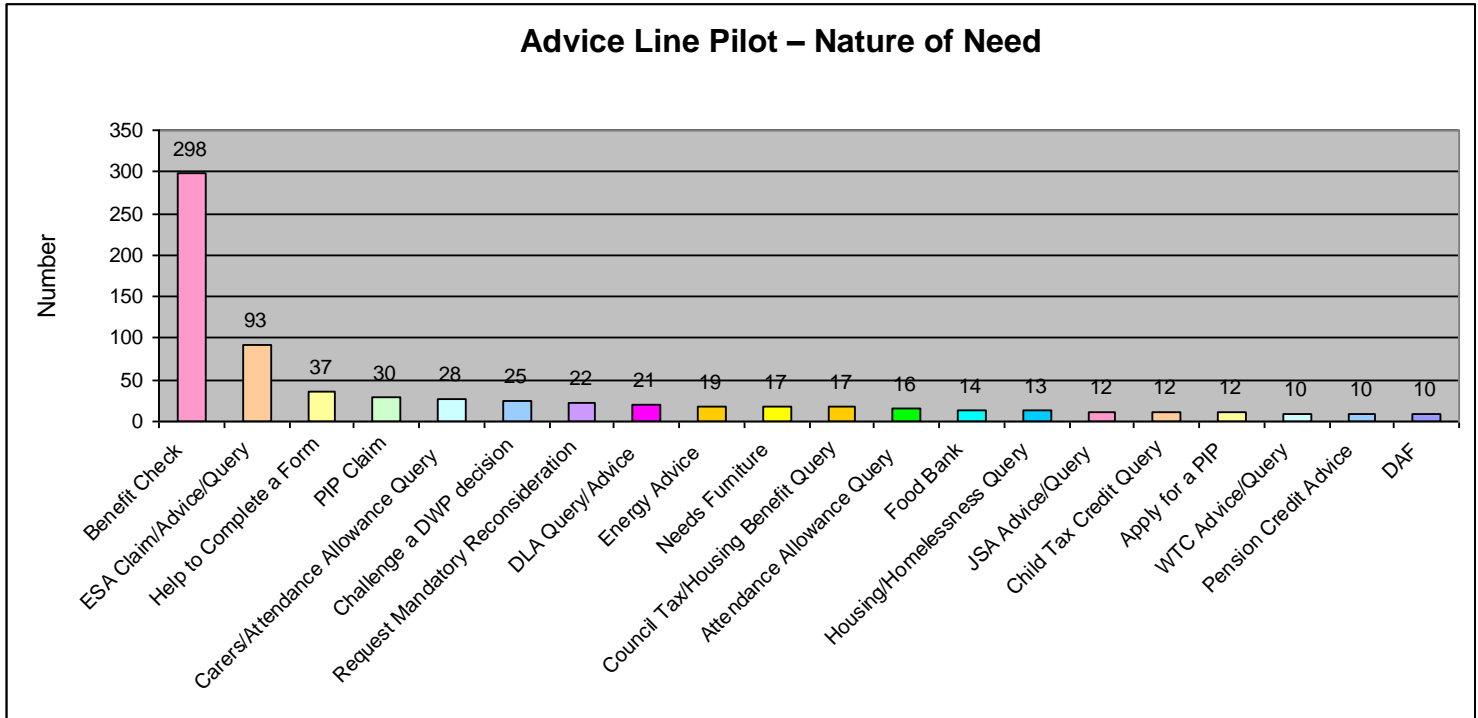
New cases are received from across the age spectrum as can be seen in figure 3.

Figure 3



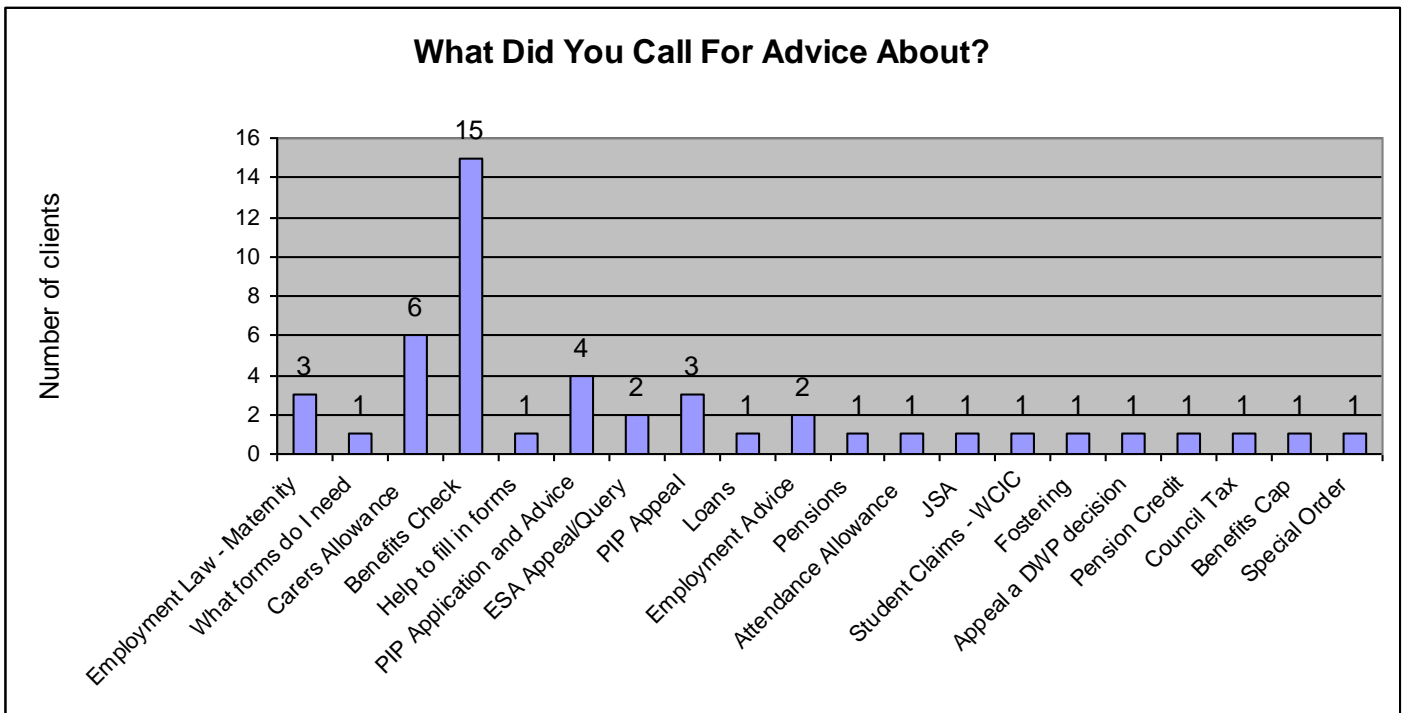
As can be seen in figure 4 below, clients contacted the advice line about a wide range of issues. The top 20 issues are shown. Benefit checks far outnumbered any other reason for calling the advice line, constituting over 35% of the enquiries made.

Figure 4



Almost 50 clients who had contacted the advice line were telephoned at a later date to ask for their feedback on the service that they had received. The reasons why they called for advice are shown in figure 5 below. Again, benefit checks outnumbered any other query being made with 31% of queries being for this reason.

Figure 5



- **Output 1 - Number of calls WRU receive**

The total number of calls received by the Welfare Rights unit fell by 15.5% during the period of the advice line running when compared with April- Sept 2013 (4307 calls prior, 3639 calls during the advice line running).

- **Output 2 - Reduced (ideally zero) reports of difficulty in putting calls through to the WRU**

The Contact Centre have reported that they no longer have difficulty in putting calls through to the WRU. However, the Contact Centre is not always able to put calls through to the advisors based there, as the advisors can be on one call for a long period of time due to the complex nature of some cases. Whilst there are two advisors based in the Contact Centre, there are occasions, due to lunch hours and other appointments etc, where there may only be one advisor present.

- **Output 3 - Number of customers referred to other agencies for assistance (may not be related to what their initial enquiry was about)**
- **Output 4 - Number of calls dealt with in one-stop**
- **Output 5 - Number of customers referred to the WRU**

These outputs are all shown in figures 6 and 7 below.

Figure 6 shows the pathways taken by clients after calling the advice line.

Figure 6

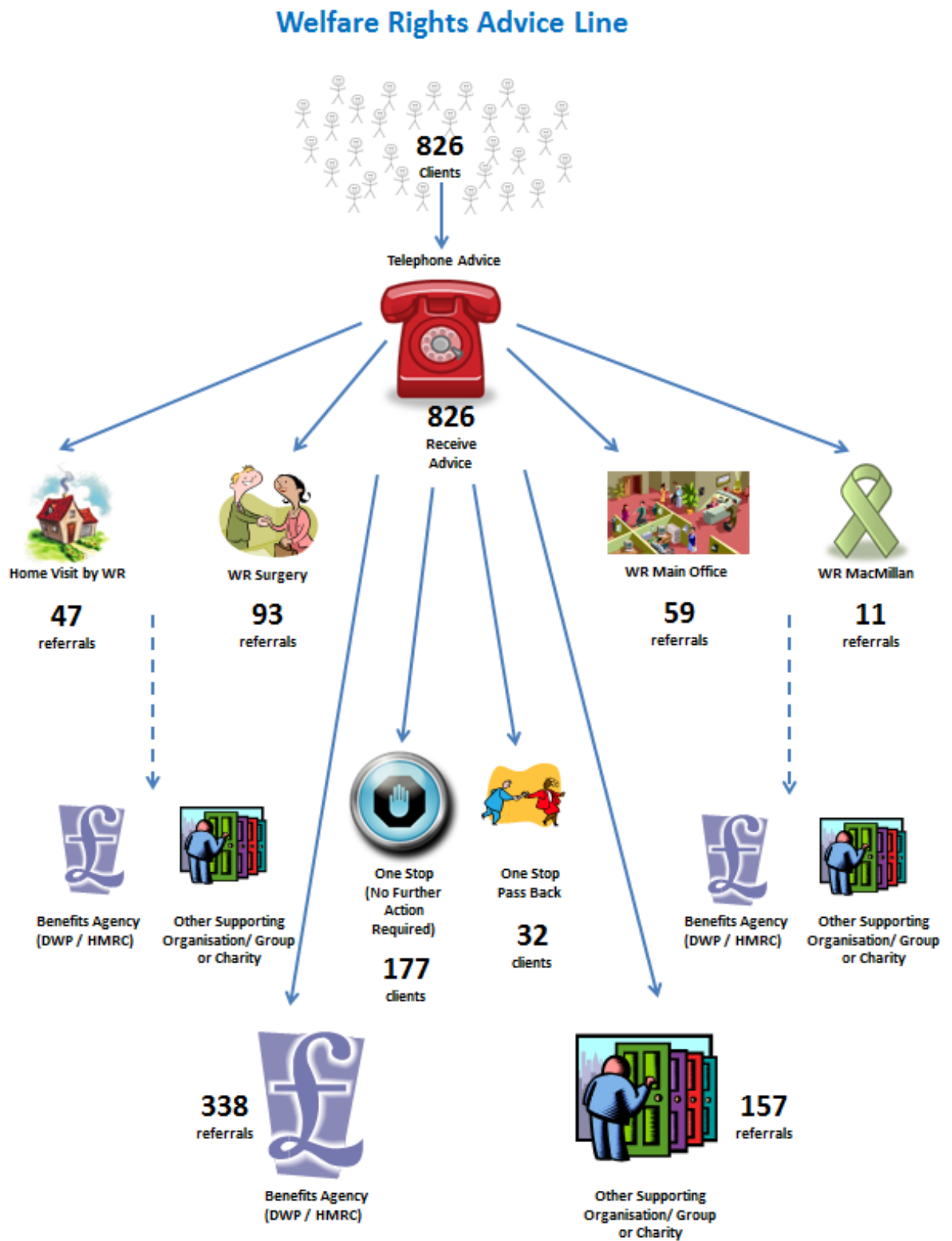
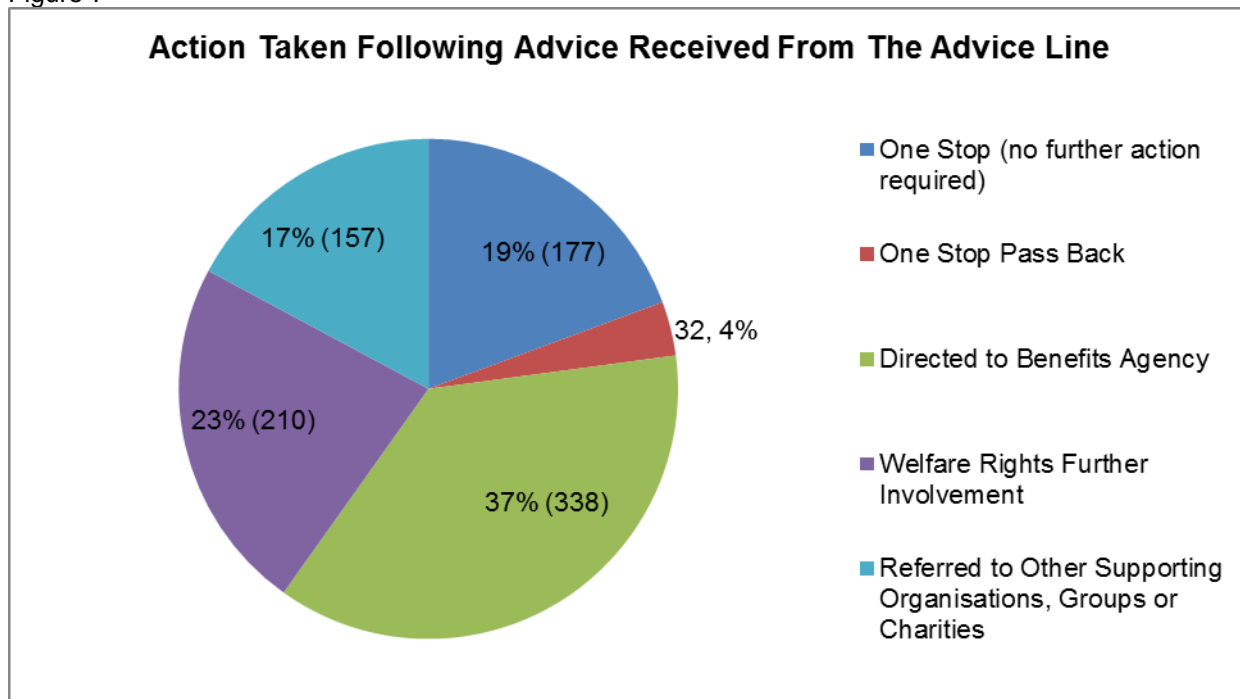


Figure 7



177 clients were dealt with one stop and required no further action having spoken to the advice line advisors.

210 clients required involvement from the WRU further to receiving help from the advice line advisors – this included to attend a surgery, a home visit, to see the Macmillan Specialist or another type of assistance. This represents 23% of all actions taken for clients who received advice from the advisors. They were passed to the WRU for further work. Whilst these clients have not been dealt with in one stop, the fact that the advisors are part of the WRU and are therefore able to make appointments in surgeries or direct referrals to the WRU, makes the process easier for callers and is another way of dealing with clients, 'in house' (as the WRU is part of NPTCBC).

338 clients were directed to a benefits agency (a range of departments within the Department of Work and Pensions and Her Majesty's Revenue and Customs). They received initial advice via the advice line advisors but then needed to contact the DWP in order to be able to resolve their query. This may have involved requesting a form, making a telephone claim or the first stage of the claim process. This represents 37% of actions taken for clients who received advice.

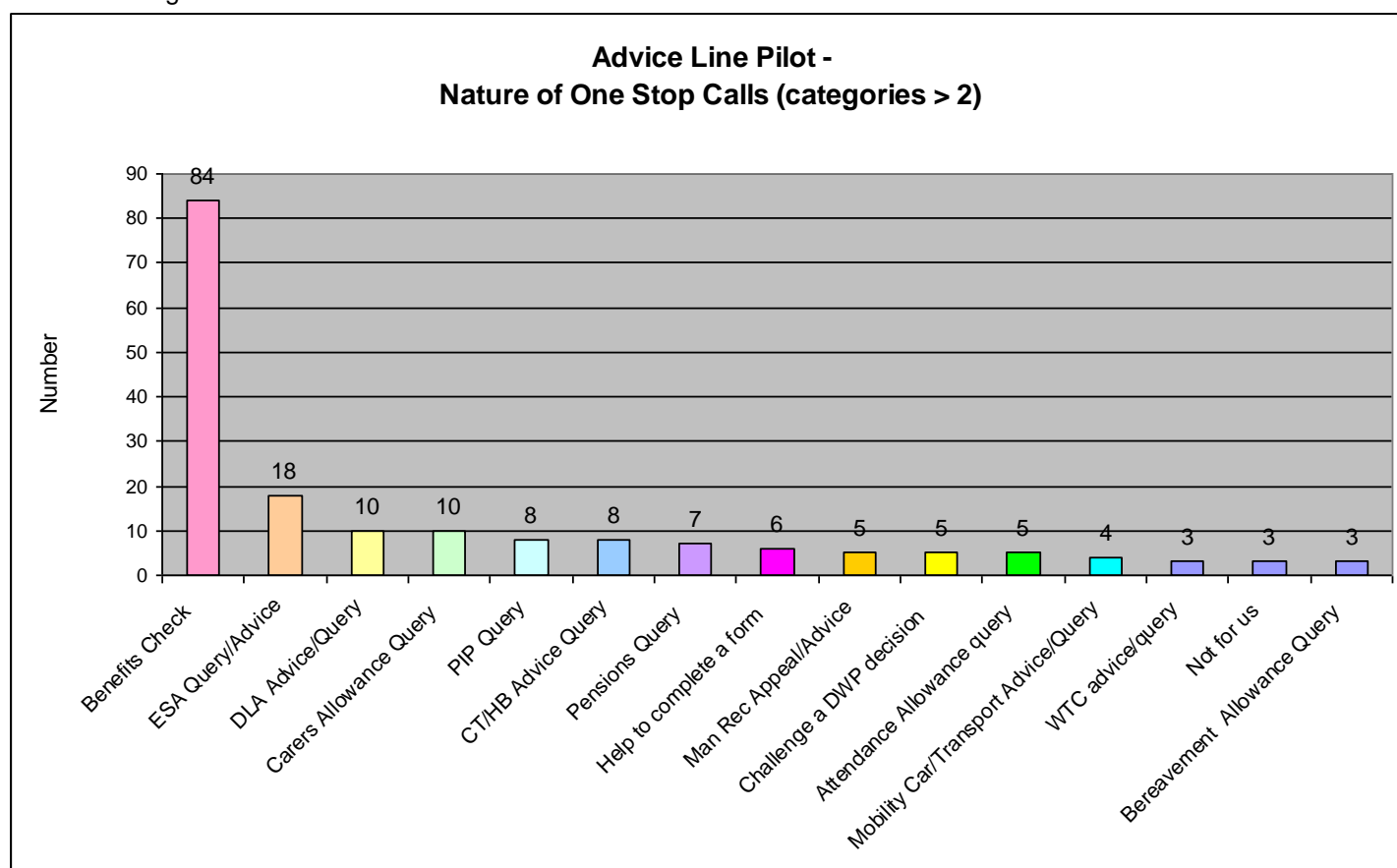
157 clients were referred onto other supporting organisations, groups or charities which included; Food Bank, Housing benefits/ Council Tax, Citizens Advice Bureau, NEST, NPT Homes, ENFYS, Credit Union, Blue Badge, Debt Advisor, ATOS, Social Services, Landlord, Shelter, MIND and to a doctor. (Any other referrals were only made on one occasion). This represents 17% of actions taken further to receiving advice.

The actions taken (914 in total) exceed the number of cases (826) as more than one action may have been taken for one client.

The nature of the calls that were dealt with one stop is shown in figure 8. It is clear from the data that benefit checks were the cases most likely to be dealt with one stop although a range of other cases were also dealt with in one stop. A benefit check enables the advisor to look at a client's circumstances and determine if they are in receipt of any benefits which they are entitled to in order to maximise the benefits that they can receive.

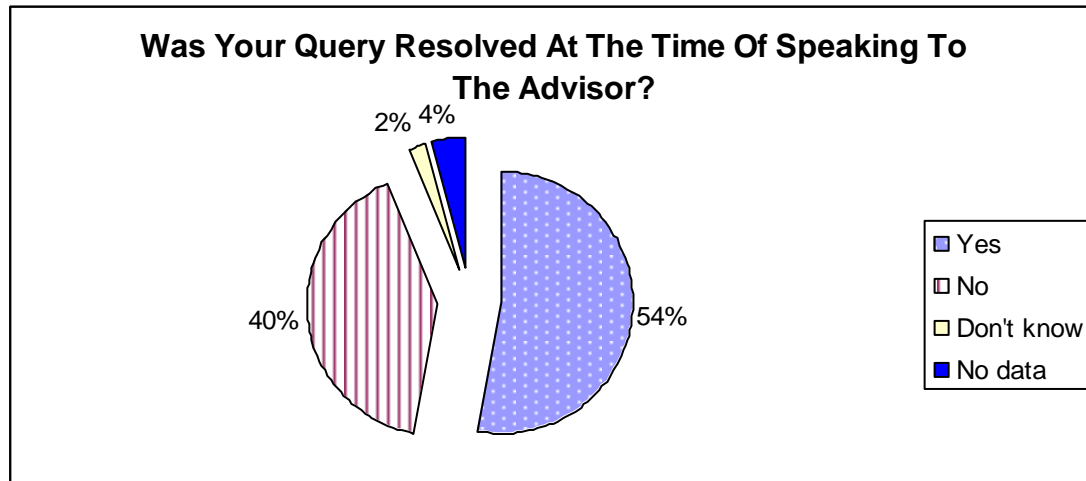
The total number of cases counted in the nature of one stop calls (below) is greater than the total number of cases dealt with in one stop (above) as in some cases one caller may have had more than one issue resolved in one stop.

Figure 8



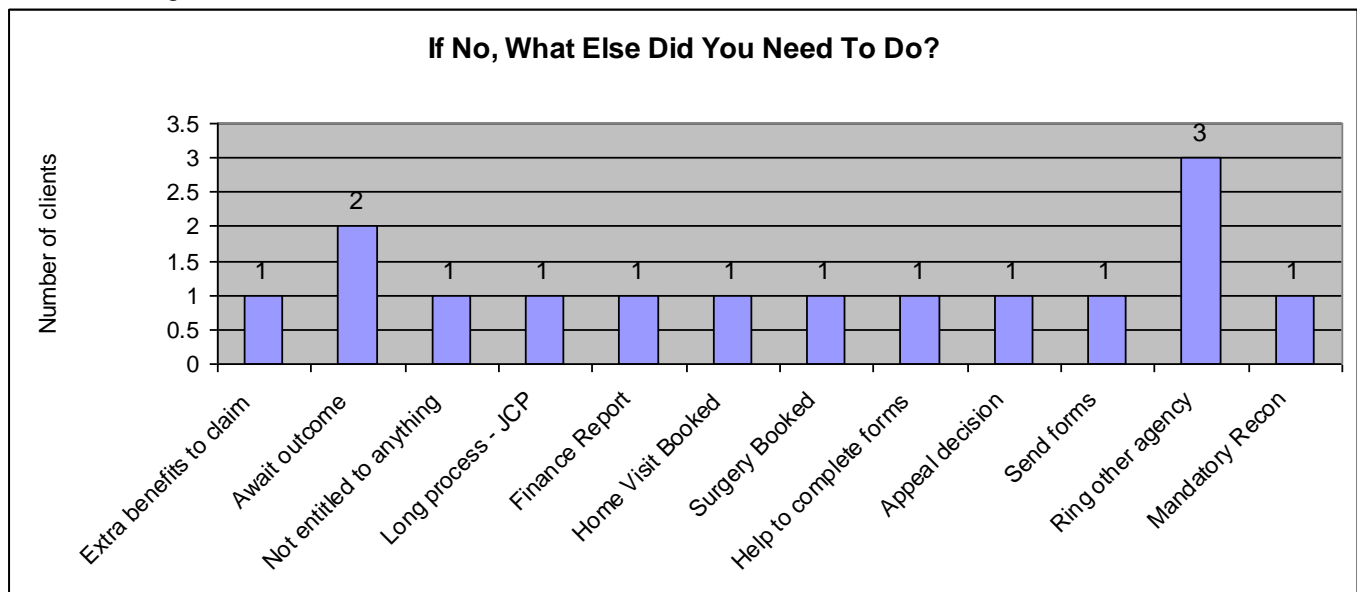
Clients interviewed further to receiving advice were also asked if their case was resolved at the time of speaking to an advisor (ie. was it dealt with one stop). As can be seen in figure 9 below, 54% of cases were resolved one stop.

Figure 9



Clients who had responded 'no' to the above question were then asked what other action they needed to take. If further action was required, they were advised on what action they could take. Responses that were provided are included in figure 10 below.

Figure 10



- Output 6 - Customers have an increased income due to acting on the advice received**

In many cases it is not known whether clients had an increased income due to acting on the advice received as this is not recorded unless the client rings the advice line again for further assistance or to advise them of the outcome. It can also take many months for the outcome to be known if a client is waiting for the outcome of an appeal or application for benefits. However, the case studies included in the outcomes section demonstrate several cases where clients have been successful in claiming benefits and therefore had an increased income due to acting on the advice they received and this is a story

that has been repeated many times. A number of the 47 clients contacted for feedback were successful in claiming benefits as a result of the advice that they received. Figure 11 shows the percentage of clients interviewed who were successful in claiming a new benefit further to receiving advice. Figure 12 shows what benefits those were and the amount the client would receive.

Figure 11

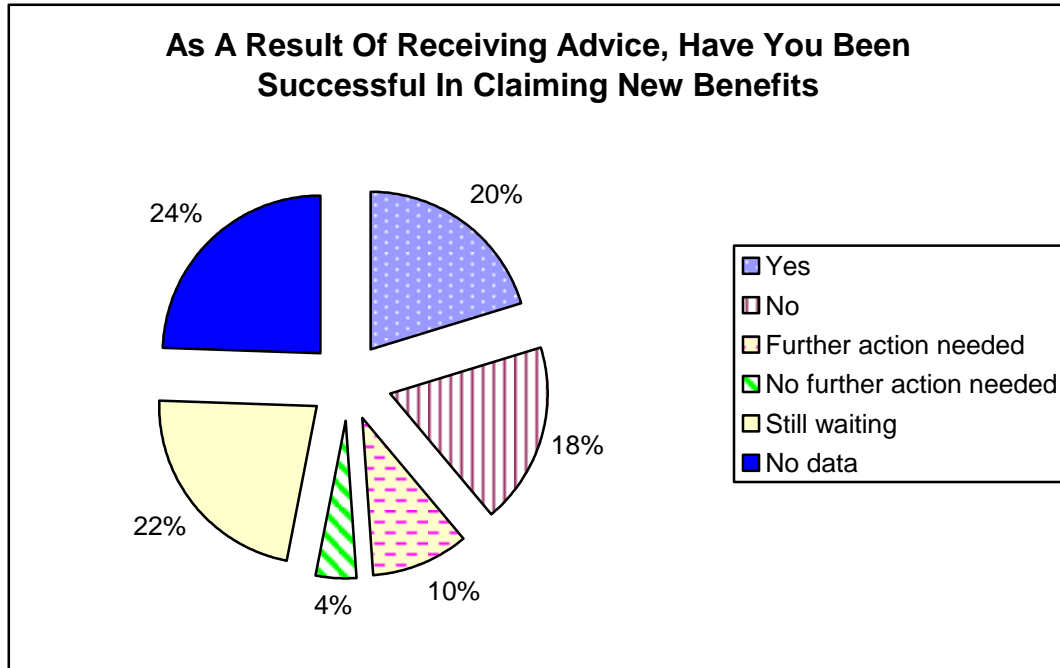
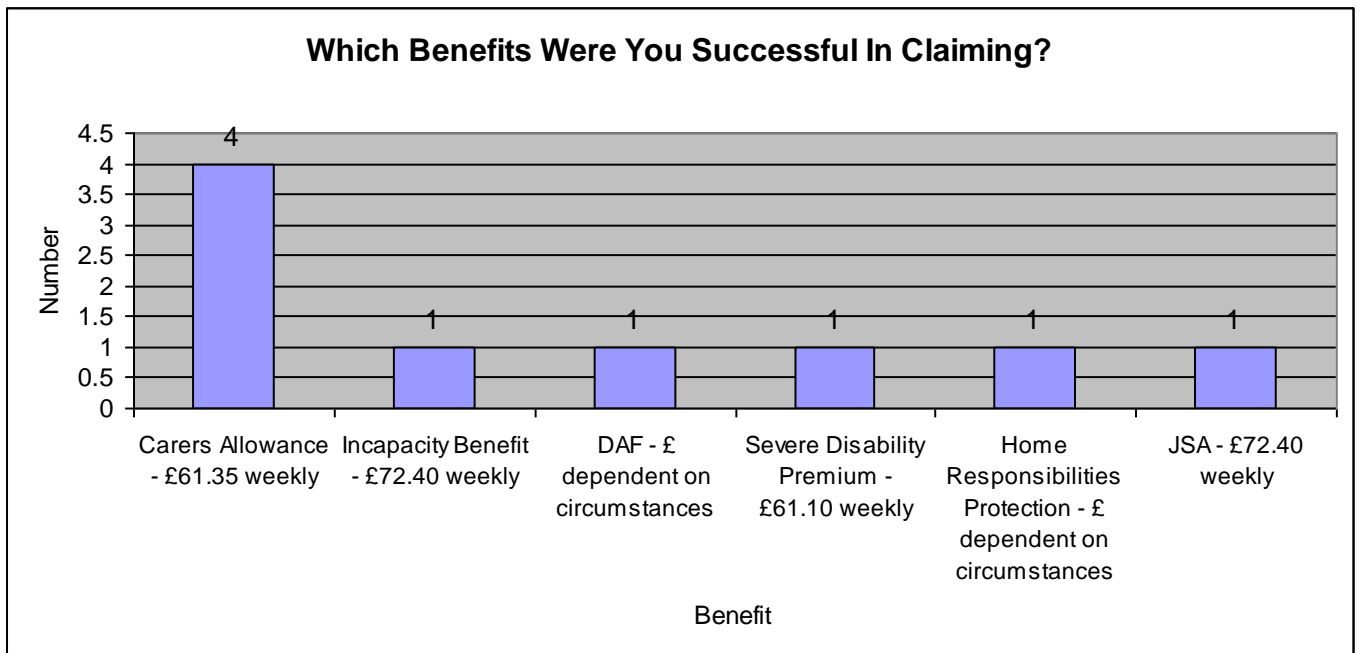


Figure 12



Outcomes

- **Outcome 1 - Reduced demand on the WRU thus freeing up some of their time to work on more complex cases and appeals**

A workshop was held with the staff from the WRU to determine their views on the advice line and what impact it had had, not only on their capacity and workload but also on clients, the council and the wider community.

There was a consensus amongst staff that the advice line has had a positive impact on the WRU. This was for a range of reasons;

- (iv) It has freed up their time to work on more complex case work as they don't have as many messages to call people back and don't have to put 2-3 hours aside during the week to be available for the advice line (that the WRU used to run internally).
- (v) It has relieved pressure on the administrative staff who used to be on the receiving end of aggravated clients who were unable to be transferred to a WRO or who had phoned previously and not been called back. It was commented on that the advice line had cut down repeat phone calls where the client was frustrated and angry and admin staff felt helpless to act.
- (vi) Several officers commented that morale had improved in the office. As one team member said, 'it puts me in a better mood not seeing 30 advice line queries when I come in, in the morning.'

The number of calls received by the WRU fell during the 6 months of the advice line running when compared to April – September 2013. 3639 calls were received (compared to 4307 calls prior) which was a fall of 15.5%.

Of the 3639 calls received by the WRU, 2273 (62%) were processed with straight away, either by being transferred straight to a WRO, resolved by admin staff, transferred straight to the advice line or booked into surgery. This was an increase from 2158 calls (50% of calls) prior to the advice line commencing.

Of the 1085 calls who asked to or needed to speak with a WRO (message, taken for a specific WRO, referral to a WRO, transferred to WRO or transferred to WRO answer machine) 407 (38%) were transferred straight to the relevant person compared to 257 (25%) in the pre advice line period. 678 of those who had contacted the WRU had to wait for a call back (a fall of almost 13% when compared to the pre advice line data).

The number of messages being taken for WRU staff fell significantly during the 6 months of the advice line running. 508 messages were taken for WROs, which was a fall of 51% when compared to the pre advice line period.

The number of referrals for WROs also fell significantly during the period of the advice line running. This figure fell from 207 referrals (inc referrals for home visits) to 101 referrals (a fall of over 50%). Prior to the advice line running, if the admin staff were unable to deal with an enquiry, it would have had to be referred to a WRO. Many of those enquiries are now transferred to

the advice line instead, reducing the workload on WRO staff and preventing them from having to deal with some of the new cases that they would previously have had to deal with.

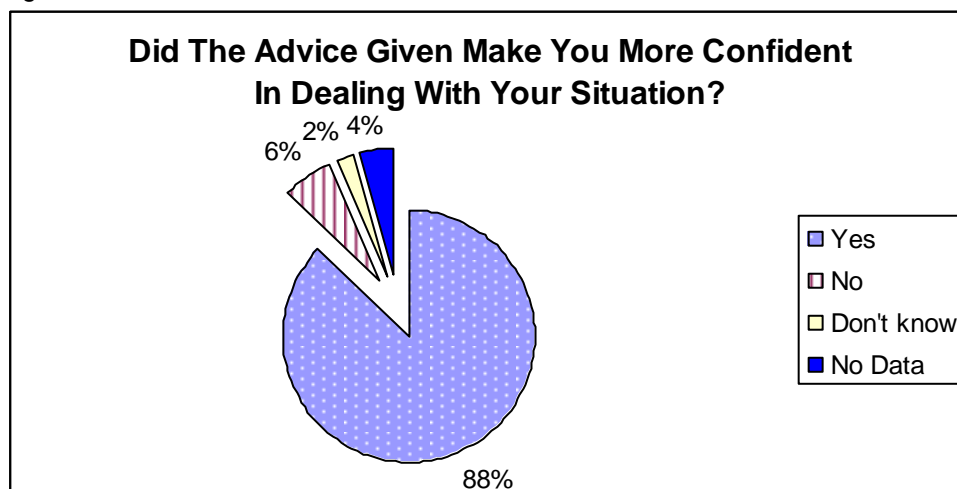
The number of calls being passed through from the Contact Centre to the WRU was recorded for the duration of the pilot project and an average of 135 calls per month were being put through from the Council's Contact Centre to the WRU, peaking at 157 calls in January 2014. This was a drop of 30% when compared to April-September 2013 and is therefore freeing up capacity within the WRU.

- **Outcome 2 - Customers feel more empowered to tackle benefits issues themselves**

Whilst the advice line aimed to reduce demand on the WRU and offer a new way of offering advice and support to clients, the intention was also to empower people so that they felt better equipped to tackle benefit issues themselves.

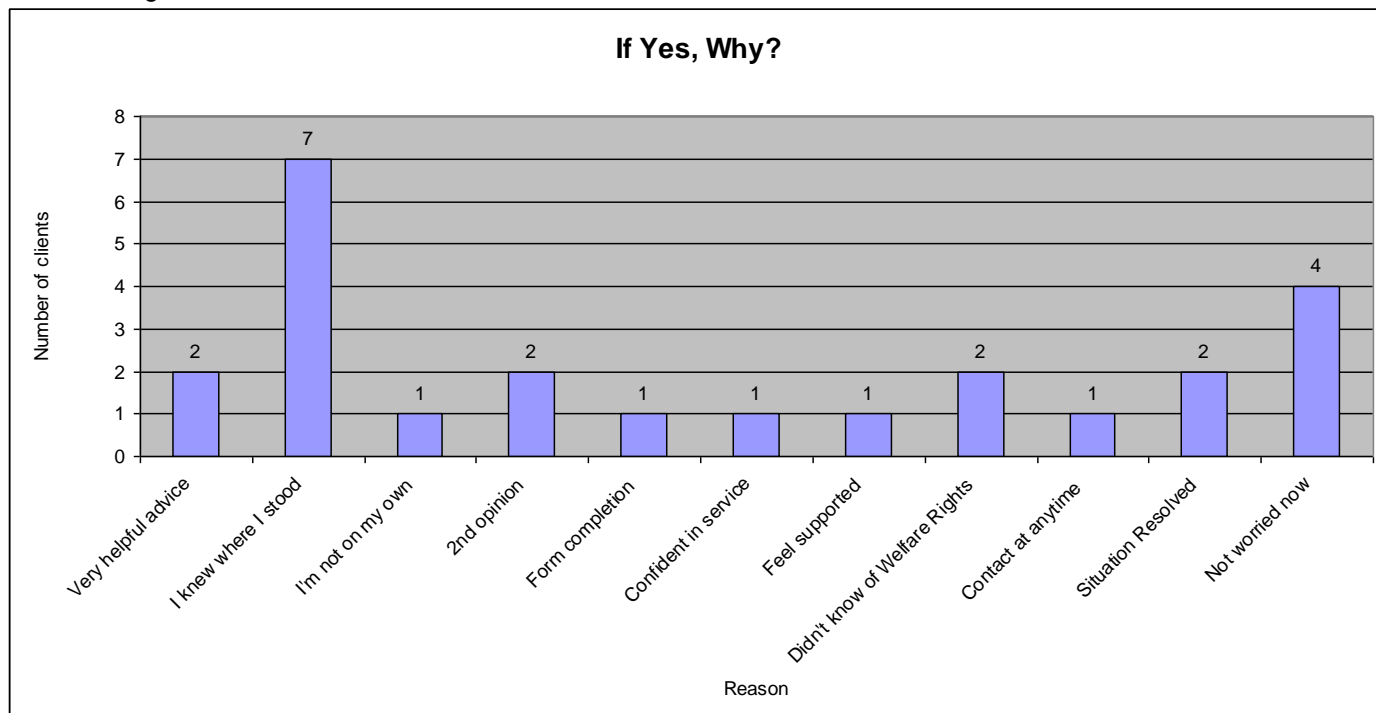
As can be seen from figure 13 below, of the 47 clients contacted for feedback, 88% of those interviewed felt more confident in dealing with their situation after having received support.

Figure 13



The reasons why clients felt more confident in dealing with their situation are shown in figure 14 below. The general themes for this were related to clients having been given more information so knowing where they stood and feeling like they had somewhere else to go for help which had alleviated some of their concerns. Only in two cases was it due to the situation having been resolved. This shows that clients value services like the advice line because it offers them a means of support with their situation, it is not necessarily associated with the final outcome.

Figure 14



- **Outcome 3 - Customers are less reliant on limited resources for support and more likely to address benefit issues for themselves.**

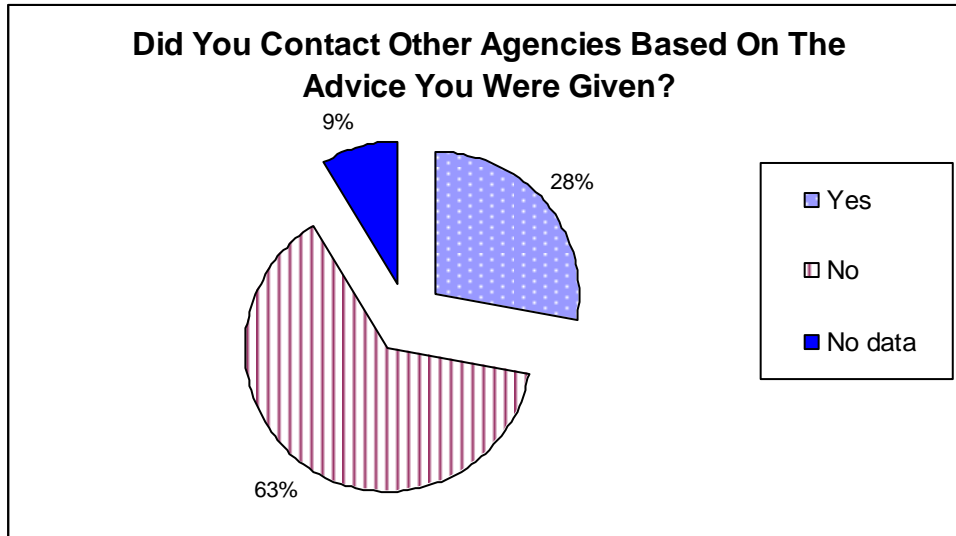
A specific question was not asked on whether clients had become less reliant on the resources and were more likely to address benefit issues for themselves. However, it is hoped that as many reported feeling more confident in dealing with their situation, this would lead to them feeling more able to tackle benefit issues themselves and consequently, be less reliant on the limited resources for support available.

- **Outcome 4 - Where necessary, customers are referred to a greater range of agencies, enabling all of their queries/ needs to be addressed**

The range of agencies that the advice line referred clients to was discussed in the outputs section. A large percentage of clients were directed to the DWP for further assistance having received advice from the advice line.

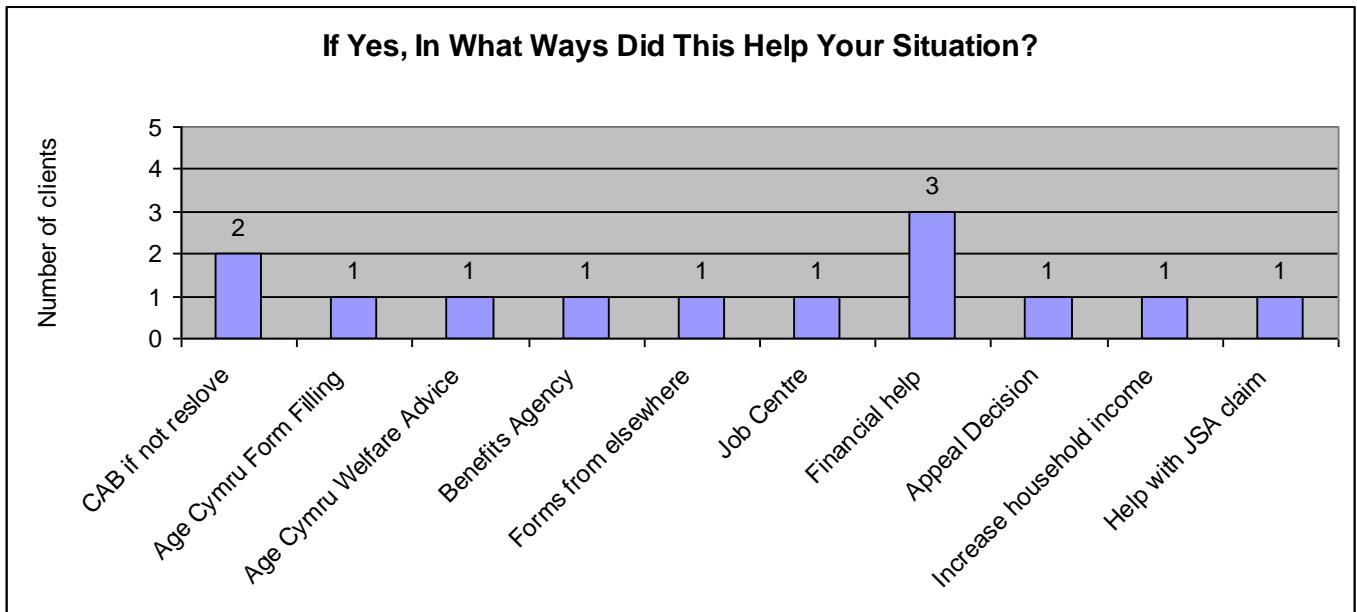
Clients interviewed were asked if they contacted any other agencies based on the advice that they were given. In these cases, to enable their queries or needs to be addressed, clients had been signposted to an agency that would be able to help. As shown in figure 15 below, 28% (14 people) of those interviewed had contacted another agency. 63% had not (no data for 9% of cases).

Figure 15



The ways in which this helped their situation are shown in figure 16.

Figure 16

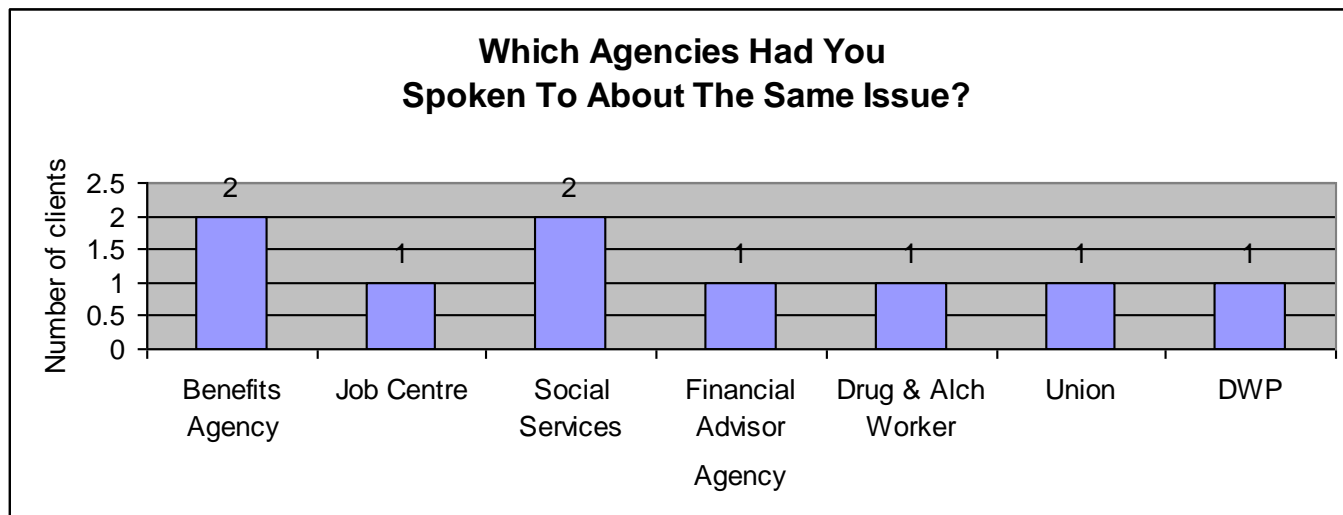


- Outcome 5 - Customers' queries and problems are addressed more holistically**

When clients ring about a specific benefit, they are offered a full benefit check. If there are further questions which the advisors are unable to help with, they will refer or redirect the client to the relevant agency to help them. The advisors reported that they are referring clients onto other agencies on a frequent basis. This is backed up by the range of agencies that the advisors refer clients to. This could be the advisor making a call on behalf of the client or just giving them the contact number of the relevant agency.

Clients were asked if they had previously contacted another agency about the same issue. Only 19% (9 clients) had done this. The agencies they had spoken to are shown in figure 17 below. 81% contacted the council as their first port of call.

Figure 17



Of the 38 clients who had not previously spoken to another agency about the same issue, 21 had their query resolved at the time of speaking to an advisor therefore their whole query had been resolved from start to finish in one phone call to one phone number (ie. in the case of almost 45% of the clients interviewed). This was a very positive outcome for clients who were able to resolve their issue quickly and easily.

- **Outcome 6 - Customers are able to improve their financial situation**

There are number of examples where customers have improved their financial situation as a direct result of the advice or assistance they received on the advice line or follow up home visits or attending a surgery having made initial contact by phone to the advice line. In some cases customers were not only successful in claiming the benefit they first rang the advice line to enquire about, but also went on to receive other benefits based on the advice they received.

Mr & Mrs P

Mr P had been found fit for work after an assessment for Employment Support Allowance (ESA) having received the benefit for over 5 years. He wanted help to appeal against the decision and to make a joint claim with his wife.

The couple had no income other than Mrs P's income from a job working 10 hours per week. The advisor helped the client to request a Mandatory Reconsideration (a written statement looking again at the unsuccessful decision and outlining the reasons for it). This was turned down. The only remaining choice he had was to go to an appeal. The Welfare Rights Unit represented Mr P at Appeal which they won and had their ESA Joint Claim Reinstated resulting in the couple receiving £95 per week.

Following this, the advisor helped Mr P to complete a claim for a Personal Independence Payment and he was awarded Enhanced Daily Living of £81.30 and Standard Mobility of £21.55 per week (paid every four weeks). As a result of this award, they were then able to claim Carers Allowance of £61.35 per week (paid every two weeks) for Mrs P. As a result of the whole intervention, Mr & Mrs P's benefit income went from zero to around £1000 per month. These benefits included ESA, Personal Independence Payment & Carers' Allowance.

Mrs L

Mrs L had been found fit for work after an ESA Assessment and was in the Work Related Activity Group. She had not worked for approximately 8 years and had no income. The advisor requested a Mandatory Reconsideration for her and as a consequence, she was placed into the Support Group. She was placed back onto ESA and will be paid it for longer because she has the Support Group Premium added. Her income went from nothing to £106.50 per week.

Mr S

Mr S had previously held a blue badge which had been revoked. The advisor explained to him that he needed to be on Disability Living allowance high mobility rate to automatically qualify for a Blue Badge. They will also give it at their discretion depending on what medication a client is taking and what medical evidence can be provided. The advisor explained that he could apply for Attendance Allowance which is similar to Disability Living Allowance but for the over 65s. She then arranged a home visit for him which took place a week later. After seeing him on a home visit they filled in the form stating he has care needs in the day and some in the night due to his physical condition. The advisor told him that it would take about 4 weeks to process. The aim was to get him on the low rate of Attendance Allowance. Mr S rang the advisor 4 -5 weeks later stating he had been awarded Attendance Allowance on the high rate of £81.30 a week and had also had it backdated – an amount of approx £500 . The advisor explained that he also needed a consultant letter so with that and having been awarded the Attendance Allowance, he got the blue badge back. The customer was very happy with the result.

Mr R

Mr R had severe mental health problems as he suffered from Post Traumatic Stress Disorder which he developed from serving in the army. He had been found Fit For Work after attending a medical. After contacting the advice line, he attended a surgery with the same advisor to discuss the issue in more detail. He attended with his mother who was very attentive and spoke for him the majority of the time. She explained his history and the mental health problems he had. The advisor wrote a Mandatory Reconsideration letter explaining that they disagreed with the decision to take him off ESA. The letter included areas where they felt he should have scored points in the work capability assessment. Medical evidence was also sent in with the Mandatory Reconsideration. The advisor told the client that it would take a few weeks to

process. Within 8 weeks they received a decision and not only had he been put back on ESA but he had been put into the support group also (the highest rate of ESA) so was receiving £112.05 per week and would not be expected to go to work-based interviews. He also received a backdated payment of £448.20. The client and his mother were thrilled with the outcome.

- **Outcome 7 - A greater level of resources is available to assist people who have complicated benefits issues to address or who have ongoing appeals**

The workshop that took place with WRU staff highlighted a number of ways in which a better service and more resources are available to assist people with complicated benefits issues or who have ongoing needs. One of the key points raised was that clients now have access to immediate advice during working hours and an overall better customer service experience is offered. Accessing advice is easier as there are two full time members of staff on the advice line whereas the advice line that used to be staffed within the WRU was only for a few hours each day, 4 days per week whereas it now runs all day, 5 days per week. The service is more flexible and accessible.

Several staff members agreed with the comment that surgeries used to be fully booked as a lot of clients were booked in for advice. Now that there is much greater capacity to offer advice by phone, slots in surgeries are available for assisting clients with form filling and more complex cases.

Prior to the advice line starting, the first point of contact for clients was with the administrative staff in the WRU. They would then be transferred to a WRO if one was available. Now clients are being put through to the advice line, usually straight away. Clients are also able to ring back and speak to the same advisor again which ensures continuity for the client and they are able to build up a rapport with the advisor.

Whilst the advice line offers an alternative to clients to speaking to the WRU, WRU staff felt that there is still a need for surgeries and home visits for complicated cases.

- **Outcome 8 - Better outcomes for customers**

The financial benefits that some clients experienced through having received advice or acting upon that advice have been discussed in both the outputs section and also in the case studies above. Also important to the outcomes that clients experience is their understanding of the advice that they received and how helpful they found it. If the understanding of advice received was poor or they did not find it helpful, it may be less likely that they would receive a positive outcome. 92% of those interviewed understood either all or most of the advice that they were given, as shown in figure 18 below.

Figure 18

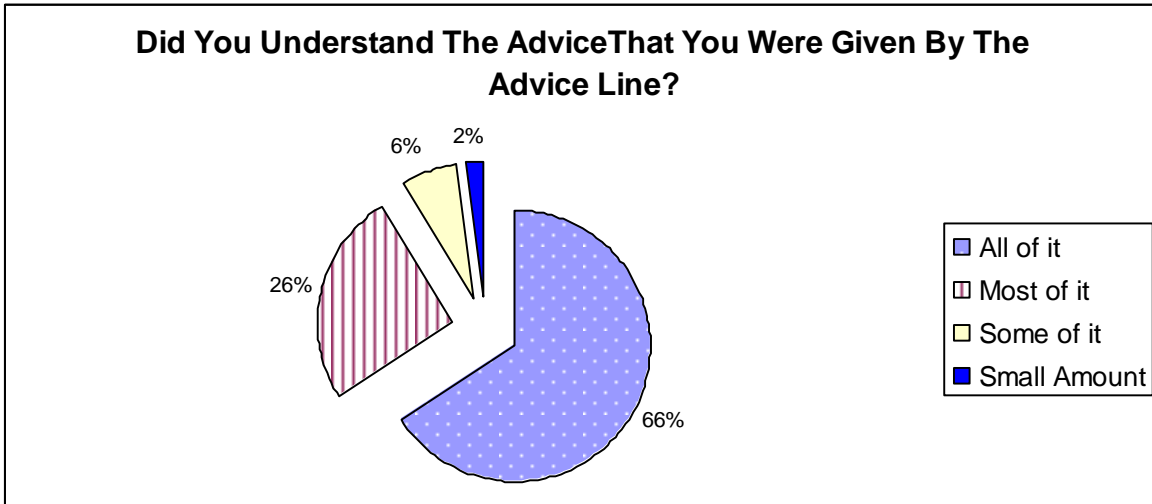
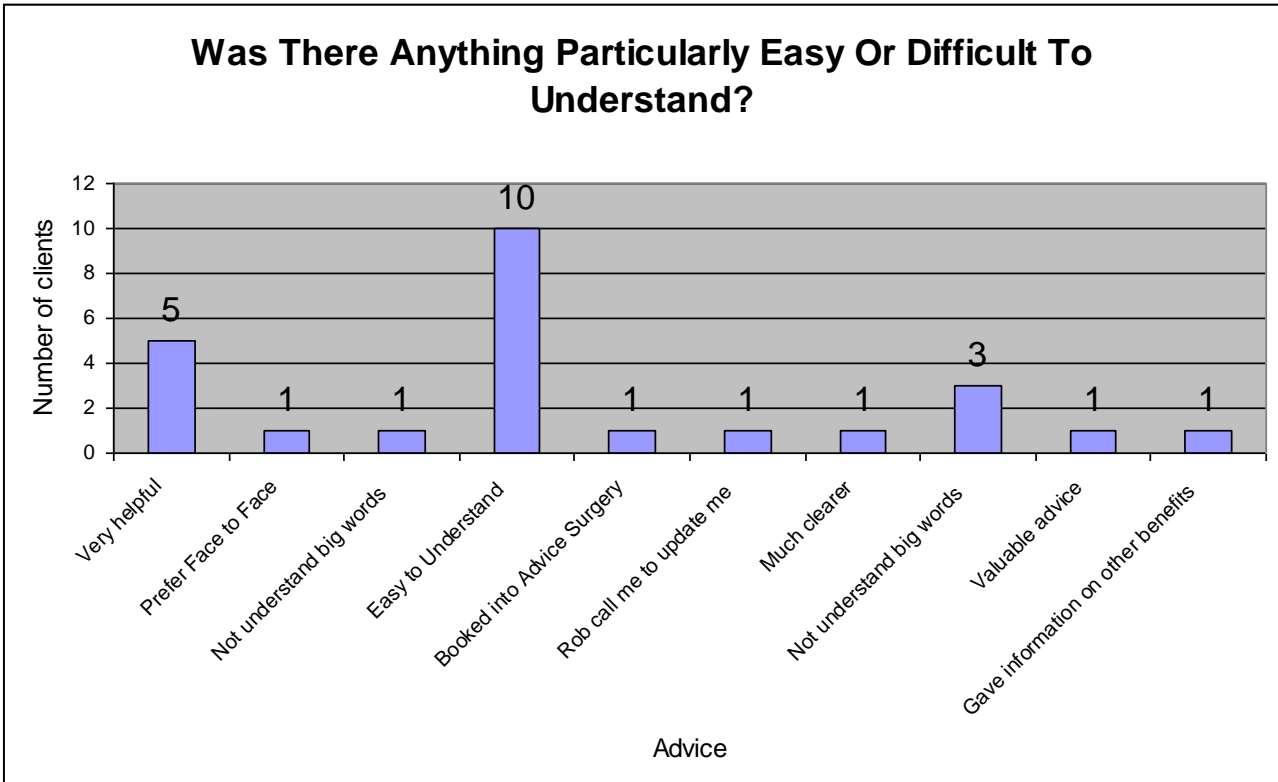


Figure 19



96% of those asked said that they found the advice that they were given either very helpful or somewhat helpful, as shown in figure 20 below. The reasons for this are shown in figure 21.

Figure 20

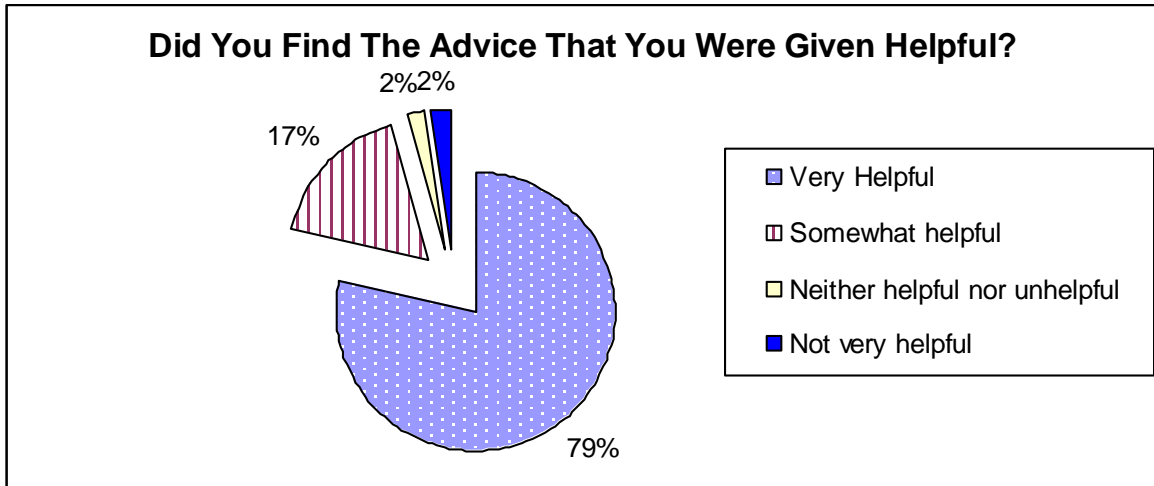
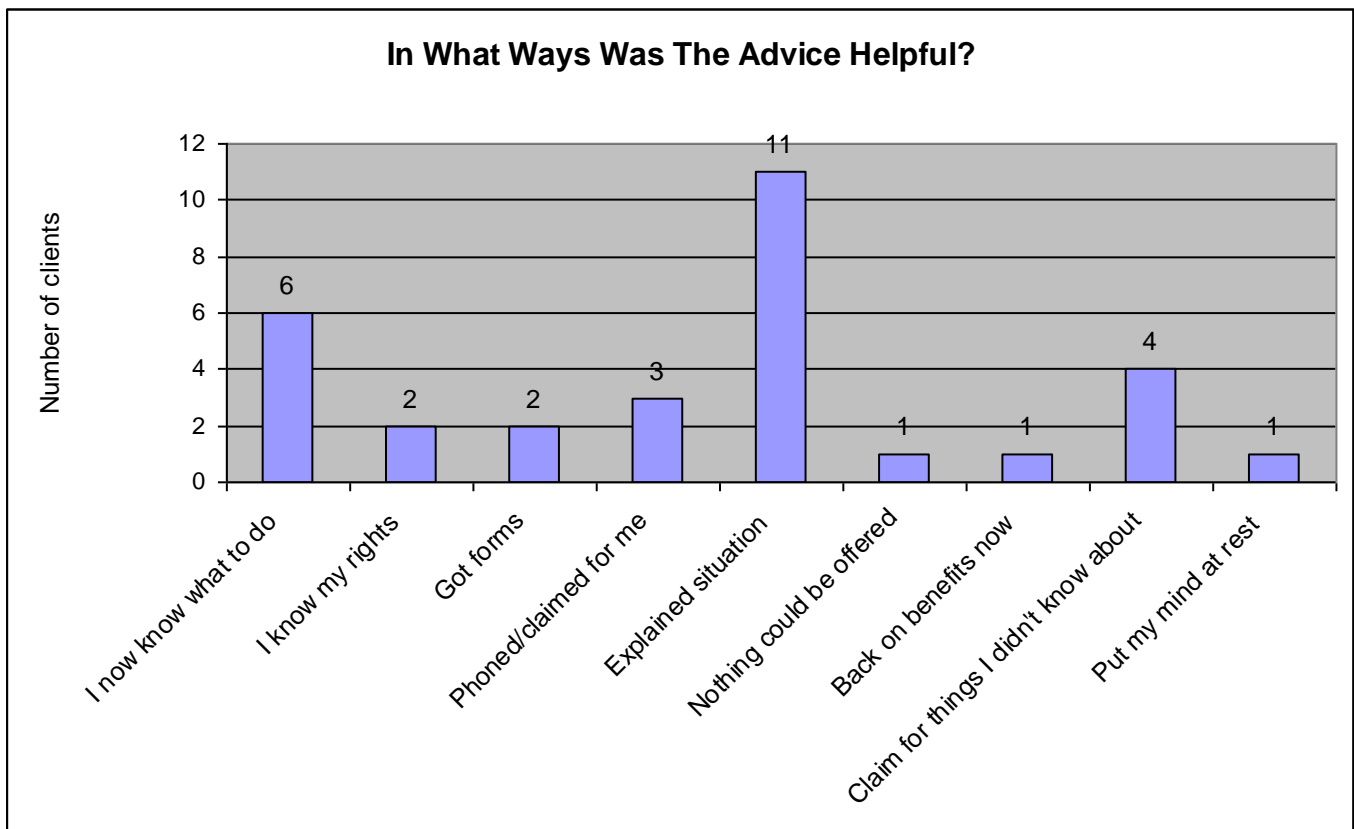


Figure 21



87% of those interviewed said that they would be likely to use services such as the advice line for other issues or concerns which demonstrates that they must have found their experience to be a positive one. The remaining 13% of clients did not respond to the question.

The workshop held with staff from the WRU to find out what impact they felt that the advice line had had, provided useful feedback. WRU staff felt that not

only has the service offered to clients improved in terms of having access to benefits advice, but that the advice line also relieves pressure on other council departments who previously didn't know what to do with some of their calls. Other departments have had training on this now and know that if clients mention financial issues or welfare advice, where to direct them to which ultimately is a better service for clients who get directed to the right place more quickly. However, there is still further work to be done to better promote the work of the WRU (suggestions were made as to advertising in the Council's internal communications or via workshops) and the advice line as there are still some staff in other council departments who are unaware of the WRU and advice line and turnover of staff in some areas can further impact on this situation. Greater promotion, however, could lead to the advice line seeing a large increase in the number of calls that they receive.

Whilst it wasn't one of the outcomes of the pilot project, the impact of the advice line on the wider community was also discussed. It was felt that the service helps to foster respect for the council within the community as the previous view held was that it would take a long time for the council to get back to you. Providing this type of advice also helps to increase a community's knowledge of these issues and gives people benefits' knowledge before they make a false step and makes them more 'savvy,' as one advisor put it.

The number of calls being dealt with by the advice line demonstrates the demand that is there for it and this was backed up by the advisors who said that although it was quiet when the line was first launched, it picked up more than they expected and there is a lot of repeat business with customers ringing back for further help. They felt that they are working at full capacity, with the volume of calls being greater than they had anticipated, 11-3 being the busiest period. As well as offering telephone advice, they each run a surgery half a day each week and do some home visits therefore they are able to see clients face to face if required.

The two advisors who staff the advice line were interviewed to gauge their view on the line and how well it has worked. The advisors very much felt that they are helping clients and often exceed clients' expectations, as having done a full benefits check, clients often end up with more than they had expected. This all contributes to meeting the outcome of customers receiving a better outcome than may previously have been the case. Of course there can be barriers to clients receiving a good outcome as in some cases clients are reluctant to give out all of their information over the phone. However, other clients see the advisors as being much like the Citizens Advice Bureau as they can speak to other agencies on behalf of clients if needed which takes the pressure off clients, again contributing to a better outcome for the customer.

On a personal level, the advisors felt that they received intensive training and have since been on further courses to extend their knowledge. The majority of calls now come direct to the advisors as once a client has rung, they will be given the direct number for the advice line. The WRU also put a large number

of calls through to the advisors. The advisors are aware of the impact the advice line has had on the WRU and that it has taken the pressure off of them. Whilst the advisors were in no doubt that clients are benefiting financially from the service they offer, they also spoke of the emotional benefit to clients of giving people a point of contact to come to if they need help or don't understand a letter they have been sent from an agency. As one of the advisors put it, 'we can take someone's worries away.' When asked, the advisors did acknowledge that the support they offer could create a dependency for some clients as they do speak to some clients on frequent occasions. The fact that they have received thank you cards is testament to the positive outcomes that clients are receiving from the service. However, some clients have expectations to be seen straight away which isn't possible.

The advisors did make some suggestions on further improving the service to clients through holding workshops or open days to offer advice.

- **Outcome 9 - Fewer people are missing deadlines for applying for benefits**
- **Outcome 10 - Impact of the welfare reforms is reduced**

Whilst customers may ring the advice line about one issue or concern, they are offered a full benefit check whilst they are on the phone therefore this may lead to them receiving new benefits that they wouldn't have otherwise have done and to reduce the impact of the welfare reform on them.

Welfare rights staff also felt that the advice line may have a positive impact on customers as they will not lose out on money due to delays in receiving advice or meeting deadlines to apply for certain benefits. The advice line advisors pointed out some of the limitations to the service as clients will sometimes ring only a short time before the deadline to appeal a benefit decision but still want help with this. The advisors will always do their best to offer advice and support right up to the deadline although ideally this work would be done face to face.

- **Outcome 11 - Welfare rights place advisors in the Contact Centre on an ongoing basis**

The advice line has been extended for a period of 4 months, from June – September 2014 using further ESF funding. Future funding is being sought.

- **Other Outcomes**

As has been demonstrated above, there are a large number of positive outcomes being derived from the pilot project. There are, however, some issues that have arisen which need to be addressed which would further improve the efficiency of the service being offered.

The issues raised were;

- Duplication of work as sometimes clients don't tell the advice line that they have already contacted the WRU about their issue. Referrals for the WRU may then be taken by the advice line for clients that already have cases open with a WRO. All calls to the advice line are treated as new enquiries unless told otherwise. Initially the advice line staff did not have access to the WRU's computer system which caused this problem to occur. They do now have access to the same IT system, however, on a read only basis therefore time is still taken up between calls in recording paperwork which may impact on the number of calls that the advisors can take.
- On occasion there has been a delay in referrals received by the advice line (which require more in depth assistance) being passed over to the WRU. This is because the advice line manually write their case notes on paper, meaning that they are not given to an Officer in the WRU until the advisor visits their office which can cause a delay. This has resulted on occasion in referrals not being received quickly enough to open a case for the client.
- Staff were asked about any concerns they had about the service. Comments were largely related to the future sustainability of the service and the impact it would have if it ended. A concern was also raised that the number of appeals that the WRU would be dealing with may rise in September (according to information they have received from the Tribunals Service) which will coincide with the advice line pilot period having ended and could cause capacity issues for the WRU.
- Over the course of the 6 months pilot project, 30.7% of calls to the advice line's direct number were abandoned (ie. not answered when first rung). The reasons for this and what could be done to address it need to be considered.
- Providing staff cover for the advice line for holidays and sickness can put pressure on WRU staff who have to cover the advice line. There was also a feeling that they would be back to square one if the advice line ended and they had to revert back to the old way of working, which no one would want.

Analysis of Logic Model

Context

The context which the pilot project was based on; the volume of calls that the WRU was receiving and difficulty that this was causing in calls being able to be put through to them from the Contact Centre, was undoubtedly causing concerns within the WRU and making it difficult for clients to access support.

Inputs (Resources) and Activities

From the workshop held with the WRU and discussions with the advice line advisors, the inputs into the pilot project are as was planned and envisaged. No queries have been raised that anything that was intended has not come to fruition. It can be assumed that demand for the service is being met as there have not been any reports of difficulties in getting through to the advisors

although lines can be busy at times. If the WRU staff are unable to put a call through to the advisors, they take a message and email it through and the advisors are able to respond within a short timescale.

Staff involved in the above activities have not indicated that the advice line should be run any differently although there are still some concerns to be addressed such as duplication of paperwork and delays that can occur in a referral being passed from the advisors to the WRU.

Outputs and Outcomes

The outputs and outcomes that have emanated from the advice line are clearly attributable to it as no other changes have taken place within the WRU or to the context that the pilot project was set in which would lead to this.

The advice line has undoubtedly had a positive impact, both on the WRU and Contact Centre as well as on outcomes for clients. There are, of course limitations within any pilot and at times clients contact the advice line a very short time before a deadline for appealing against a benefit decision. The advisors will still do their utmost to assist the client, even if this then needs to be by phone when face to face would have been preferable. Some clients may also be reluctant to give all of their information over the phone which may impact on the extent to which they can be assisted and therefore benefit from the pilot project.

Calls into the WRU have fallen by 15.5% since the advice line was launched and the Contact Centre are no longer reporting difficulties in putting calls through to them, and they are putting 30% fewer calls through to the WRU than prior to the advice line running. The advice line dealt with an average of 138 new cases each month, a large number of whom would have previously been likely to call the WRU instead. The WRU has also been able to direct a large number of calls that they received, to the advice line, a large number of which would previously have ended up having a message taken which would have been passed to a WRO to call back. The number of messages that the WROs were previously needing to respond to was creating a large workload and affecting morale. This situation has improved vastly since the advice line started and the number of messages being taken for the WRU has fallen by 51%. A workshop with WRU staff demonstrated that they are now feeling more positive and feel that clients are getting a much better service as they can access help straight away which wasn't previously the case.

There have not been any unintended outcomes from the advice line and other than the few concerns raised about some of the processes involved in the service, which have at times led to a duplication of paperwork, or delays in the WRU receiving referrals and concerns regarding providing staff cover for the advice line when there are shortages, the outcomes have been achieved and have been very positive. However, the reasons behind the number of abandoned calls need to be looked at in further detail. The advice line advisors now have access to the WRU's IT system and are able to input their cases into it, meaning that there is no longer duplication of work as the advisors can see if there is already a case open for a client, in which case

they will refer them to the appropriate WRO. They also no longer need to wait for internal mail or to visit the WRU to take new (more complex) referrals over. This has made the process quicker for customers and easier for staff. IT systems from other areas are also being looked at to see if a new or amended system could be put into place, to include elements that the team would find useful. As the advisors are still only able to access the WRU's IT system on a read only basis, this means that they need to complete paperwork between calls, taking up time that could be spent advising clients.

There have been no other suggestions for any ways in which the pilot project should be changed although the advisors queried whether there should be more publicity about the advice line. However, if this were to be done, the ability of the advice line to deal with any large increase in demand would need to be considered. The biggest concern amongst both staff within the WRU and the advice line advisors is the future sustainability of the pilot project as the benefits to both client and the WRU have been clearly established. If the line were to close or have to change substantially, the benefits being reaped would be lost, with clients no longer having quick access to advice and support and the WRU having to take on additional work. This would impact on their ability to deal with the more complex cases that the additional capacity created by the advice line has enabled them to do.

It is clear from the number of calls being received to the advice line and the number of new cases being dealt with, that there is a strong demand for the service. The advisors are receiving a good volume of calls and feel that they are working at full capacity. Benefit checks constitute the largest reason for people calling and even if clients have called for another reason, they are offered a full benefit check. If the advisors are unable to fully resolve a client's query, the client may be directed to another agency for further advice. 210 clients were passed to the WRU for more in depth assistance (23% of actions taken further to speaking to the advice line). 338 clients were directed to a benefits agency for further assistance (37% of actions taken). 157 clients were referred to a specialist agency for advice (17% of actions taken).

Given the way in which the benefits system is set up, with different agencies and departments dealing with different benefits, it is not surprising that a large proportion of queries do need to be directed to another agency or referred elsewhere.

Clients are happy with the service received and they are clearly benefiting from it, with a number of those contacted for feedback stating that they were now receiving benefits that they hadn't previously been, as a result of the advice or support that they received. 87% said they would be likely to use the advice line or similar services for future queries, indicating that they were happy with the help they received and found it to be beneficial. The case studies back up this assertion. Of those interviewed, 88% felt more confident in dealing with their situation further to receiving advice. It is hoped that this would translate into clients feeling more empowered to deal with similar situations in the future although the extent to which this may happen is questionable as many clients do call back and given the high level of

satisfaction there appears to be with the service received, there would no reason to assume that they wouldn't call back if they had a new query.

Whilst the longer term outcome for many clients is not known and what impact, if any, there has been on their financial situation, it is known that some clients have definitely benefited financially from the advice that they have received. 20% of those interviewed were in receipt of a benefit or financial assistance that they had not been prior to receiving advice and the four case studies included give specific examples of clients who are now better off due to having received advice and support. In each of those cases their income increased from between approx £80 per week to £250 per week (for a couple) and if more examples were sought, this would undoubtedly be a story that would be replicated many times over.

Conclusion

- There has been a positive impact, both on the WRU and Contact Centre as well as on outcomes for clients
- The advice line are dealing with an average of 407 calls per month
- The main reason for customers contacting the advice line is for a benefits check
- 177 clients were dealt with one stop
- 210 clients required involvement from the WRU after receiving help from the advice line advisors (attending a surgery, a home visit, to see the Macmillan Specialist or another type of referral). This represents 23% of all actions taken for clients who received advice from the advisors
- 338 clients were passed onto a benefits agency (a range of departments within the Department of Work and Pensions and Her Majesty Revenue and Customs). They received initial advice via the advice line advisors but then then needed to contact the DWP in order to be able to resolve their query. This represents 37% of actions taken further to receiving advice
- 157 clients were referred onto other supporting organisations, groups or charities. This represents 17% of actions taken further to receiving advice
- For 81% of those interviewed, the council was the first agency they thought to contact when looking for advice or support
- 87% of those interviewed said they would be likely to use the advice line or similar services for future queries
- 88% of those interviewed said they felt more confident in dealing with their situation further to receiving advice
- 20% of those interviewed were successful in claiming extra benefits. 22% of those asked were still awaiting the result of their claims
- The number of messages being taken for the WRU has fallen by 51%, since the start of the advice line, freeing up their capacity to deal with more complex cases
- Calls into the WRU have fallen by 15.5% since the advice line was launched

21.10.14

- Welfare Rights Officers/ staff have been very positive about the advice line and feel that clients are getting a much better service as they can access help straight away
- Staff morale in the WRU has improved
- The Contact Centre are putting 30% fewer calls through to the WRU than prior to the advice line running
- The four case studies included give specific examples of clients who are now better off due to having received advice and support. In each of those cases their income increased from between approx £80 per week to £250 per week (for a couple)

Appendix 1 – Logic Model

Provision of basic advice to empower people to improve their financial situation					
Context	Inputs	Activities	Outputs	Outcomes (short and medium term)	Impact (long term)
<p>Anecdotal evidence from the Council's Contact Centre shown that only 1 in 3 calls to the Contact Centre were able to get through to Welfare Rights</p> <p>Changes to the benefits system have led to a high demand for advice services. Calls for the WRU regularly feature in the top ten calls received by the Contact Centre</p> <p>Neath Port Talbot is in the top ten UK local authorities of the loss of income per working age</p>	<p>2 Contact Centre advisors</p> <p>Project Steering Group</p> <p>Welfare rights manager</p> <p>Contact Centre management</p> <p>Low income families steering group</p> <p>ESF funding for project manager</p> <p>Project Manager to co-ordinate work</p>	<p>2 advisors working office hours in the Council's Contact Centre for a 6 month trial period.</p> <p>Advisors take all initial calls that come into the Contact Centre, asking for advice on benefits or asking to speak to the welfare rights unit (unless they already have an ongoing query with the unit).</p> <p>Advisors assist with any new enquiries that they can. If they are unable to assist, they arrange an appointment for the</p>	<p>Number of calls taken by the advisors.</p> <p>Number of customers referred to other agencies for assistance (may not be related to what their initial enquiry was about).</p> <p>Increased capacity of WRU staff to deal with complex cases and appeals.</p> <p>Reduced (ideally zero) reports of difficulty in putting calls through to the WRU.</p> <p>Number of calls</p>	<p>Reduced demand on the WRU thus freeing up some of their time to work on more complex cases and appeals.</p> <p>Customers feel more empowered to tackle benefits issues themselves</p> <p>Where necessary, customers are referred to a greater range of agencies, enabling all of their queries/ needs to be addressed.</p> <p>Customers' queries and problems are addressed more holistically.</p>	<p>Raised incomes through receiving appropriate and timely advice regarding benefits</p>

<p>adult due to the welfare reforms The WRU receives a large number of calls and when customers get through, they are often not able to speak to an advisor straight away and have to wait up to 2 weeks for a call back.</p> <p>Customers missing targets to apply for benefits due to not being able to access support quickly enough.</p> <p>Welsh Government research has indicated that telephone advice is an area of development for delivering advice services.</p>		<p>customer with the WRU.</p>	<p>dealt with in one-stop Number of customers referred to the WRU</p> <p>Number of calls WRU receive</p> <p>Customers have an increased income due to acting on the advice received</p>	<p>Welfare rights place advisors in the Contact Centre on an ongoing basis.</p> <p>Customers are able to improve their financial situation.</p> <p>A greater level of resources is available to assist people who have complicated benefits issues to address to or who have ongoing appeals.</p> <p>Better outcomes for customers</p> <p>Fewer people are missing deadlines for applying for benefits.</p> <p>Impact of the welfare reforms is reduced</p>	
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<p>Welfare Reform is anticipated to continue the current trend of increased demand for specialist welfare benefit, debt and housing advice as well as for financial inclusion advice.</p>				<p>Customers are less reliant on limited resources for support and more likely to address benefit issues for themselves.</p>	
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Evidence	Evidence	Evidence	Evidence	Evidence	Evidence
<p>Baseline data for number of calls received by WRU (Apr-Dec '13 = how many get through, leave a message etc, number who got to speak to an advisor straight away (36% of calls)</p> <p>National research on the impact of the</p>	<p>Review of partners involved to identify any gaps</p>		<p>As above</p>	<p>Less calls received by WRU</p> <p>WRU has greater capacity to deal with complex cases</p> <p>Number of customers dealt with one stop Customers report feeling more empowered to deal with benefit issues</p>	<p>From a range of case studies, calculate additional income received through benefits obtained as a result of advice received from Contact Centre advisors</p>

welfare reforms showing loss in income				themselves Interviews with customers pre and post intervention (and at a later date)	
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Appendix 2

Questions – Welfare Rights Advice Line Clients

1	What did you call for advice about?	
2	Had you spoken to any other agencies about the same issue before contacting us? If yes, which agencies?	Yes <input type="checkbox"/> No <input type="checkbox"/> Don't know <input type="checkbox"/>
3	Did you understand the advice you were given by the advice line? Was there anything particularly easy or difficult to understand?	All of it <input type="checkbox"/> Most of it <input type="checkbox"/> Some of it <input type="checkbox"/> A small amount of it <input type="checkbox"/> None of it <input type="checkbox"/>
4	Did you find the advice you were given helpful? In what ways was it helpful?	Very helpful <input type="checkbox"/> Somewhat helpful <input type="checkbox"/> Neither helpful nor unhelpful <input type="checkbox"/> Not very helpful <input type="checkbox"/> Not at all helpful <input type="checkbox"/>
5	Was your query resolved at the time of speaking to the advisor on the phone? If no, what else did you need to do?	Yes <input type="checkbox"/> No <input type="checkbox"/> Don't know <input type="checkbox"/>
6	Did you contact other agencies based on the advice you were given? If yes, in what ways did this help your situation? If no, why was this?	Yes <input type="checkbox"/> No <input type="checkbox"/>

7	<p>Did the service given to you by the advice line make you feel more confident in dealing with your situation?</p> <p>If yes, why?</p>	<p>Yes <input type="checkbox"/></p> <p>No <input type="checkbox"/></p> <p>Don't know <input type="checkbox"/></p>
8	<p>Would you be likely to use advice services like these for other issues or concerns?</p> <p>If yes, why?</p>	<p>Yes <input type="checkbox"/></p> <p>No <input type="checkbox"/></p> <p>Don't know <input type="checkbox"/></p>
9	<p>(If call related to benefits)</p> <p>As a result of the advice you received, have you been successful in claiming new benefits?</p> <p>Which ones?</p> <p>Has this improved your overall financial situation?</p>	

Questions – Welfare Rights Advice Line Advisors

1	Is the service what you expected it would be – the way it is running, opening times, types of enquiries, way you receive calls etc?
2	Is there anything that you think should be done differently?
3	Are resources being used in the best way?
4	Are you able to meet the demand for this service – can people get through, are people reporting any difficulties etc?
5	Do you think that the project is able to meet the needs of the service users – can you resolve their enquiries or direct them to someone who can? Which agencies are you referring people to? Have there been any problems involved with doing this?
6	Are you aware of any barriers to people accessing the service eg. getting through, opening times, phone service etc?
7	Is there anything that hasn't been done in the service that you thought would be? Has this had any impact on the service?
8	Do you think that service users have benefited from this service? In what way?
9	Have there been any outcomes or benefits from this project that you hadn't envisaged?
10	Is there anything that you think could be done to improve the outcomes for service users from this project?

Workshop Plan for: Welfare Rights

Date: Thursday 1st May 2014 **Time:** 9.30 – 11.45

Venue: Tregelles Court

Time	Activity	Lead
9.30 – 9.35	Welcome, Housekeeping and Introduction	Sian/ Hannah/ Jackie
9.35 – 9.40	Icebreaker	Sian
9.40 – 9.45	Setting the Scene	Sian
9.45 - 9.50	Exercise 1: Introduction to Celebrating Success	Sian
9.50 – 10.00	Working in groups of 3 – participants answer each question by completing 2 answers on post-its per question and place on the board.	
10.00 – 10.10	Feedback to the group – each group to feed back to the wider group about their answers.	
10.10 – 10.15	Exercise 2: Introduction to Working / Not Working	Hannah
10.15 – 10.30	Working individually – participants are given 3 post-its and are asked to write down one answer per post-it to answer the question on what's working or not working about the new way of working (pilot) from their perspective and to place them on the Board.	
10.30 – 10.40	Participants to gather around the board and group the answers into themes.	
10.40 – 10.45	Participants to be given 3 sticky dots each and asked to prioritise the most important answers by placing dots next to the themes.	
10.45 – 10.55	BREAK – Put up flipchart	
10.55 – 11.00	Exercise 3: Introduction to Four Plus One Questions Exercise	Sian
11.00 – 11.15	Working in groups of 3, have a discussion about the four questions and complete 2 post-its for each question:- <ul style="list-style-type: none"> • What have we tried? • What have we learned? • What are we pleased about? • What are we concerned about? 	
11.15 – 11.25	Each group then feedback on their answer to the other groups.	
11.25 – 11.30	Exercise 4: Introduction to the Road Ahead	Hannah
11.30 – 11.35	Each participant is given 2 dots which are different colours. Plot on the road where they felt they were when the pilot began by placing a dot on the road. Then place a dot where they feel they are now.	
11.35 – 11.40	Summing up & Next Steps	Sian/ Hannah
11.40 - 11.45	Any questions	